The Power of PowerLink Part 1

Reviewing the Features and Functions of PowerLink

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THE INFOR XA EXPERTS

Overview of the Power of PowerLink Part 1

- Security Settings
- Main PowerLink cards
- PowerLink Preferences
- Lists
  - Tool bars
  - Views
  - Subsets
  - Sorts
  - Setting Favorites
- Templates
- Object Preferences
- Shortcut (Control) Keys

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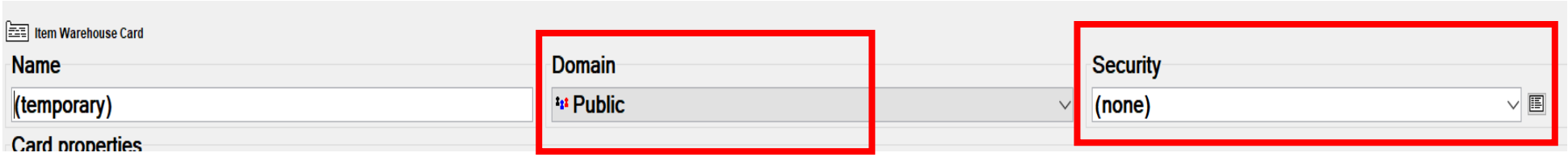
Security

Security options in PowerLink



- All views, subsets, sorts, cards, card files, templates have 3 security options
  - PUBLIC
    - Available to anyone in the company
  - PRIVATE
    - Only available to the person who created the option
  - PUBLIC BUT SECURE
    - The option (view, card, etc.) is flagged as ‘Public’ but a security group is added in the ‘Security’ field
    - IT will need to create the group and add users to it.
    - Only people in the group will be able to see/use the option

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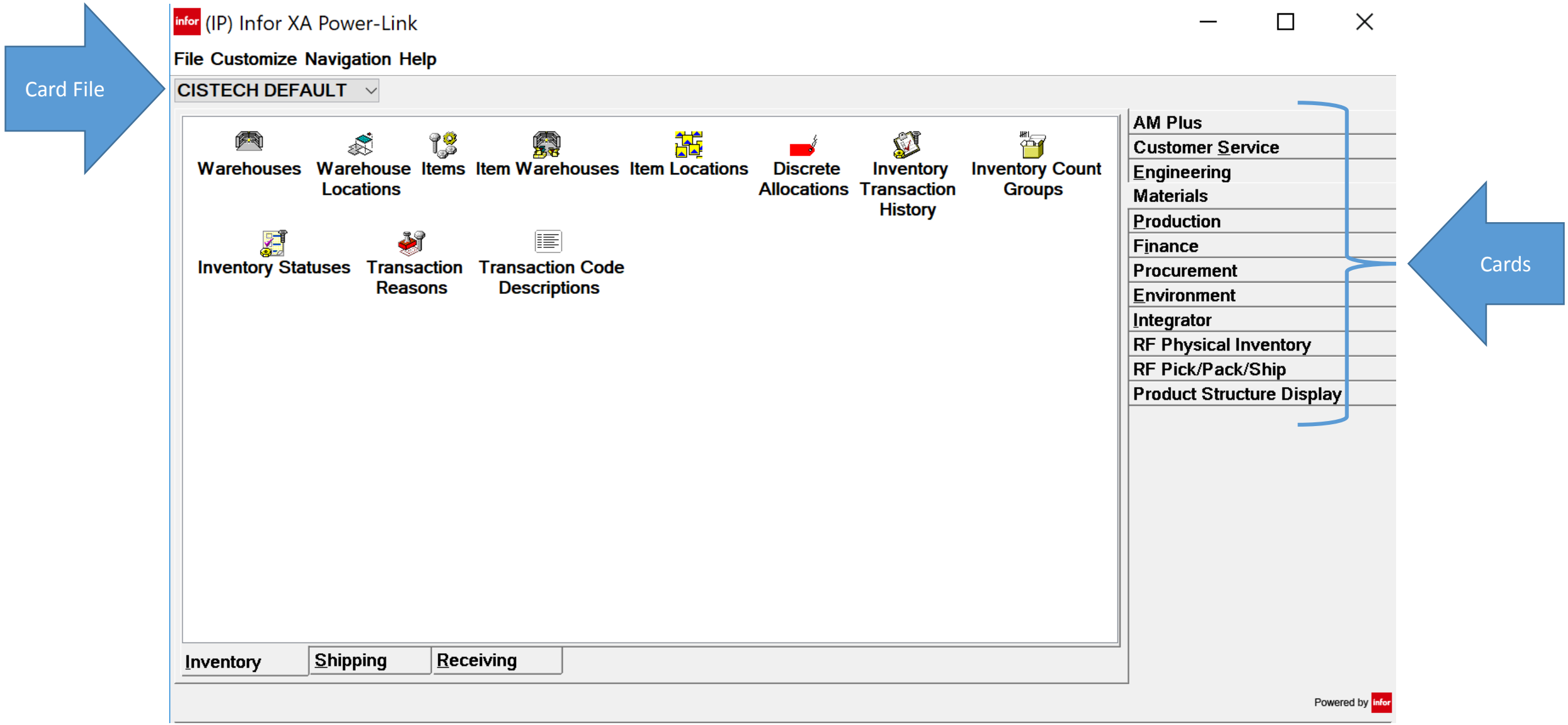
Main Card File

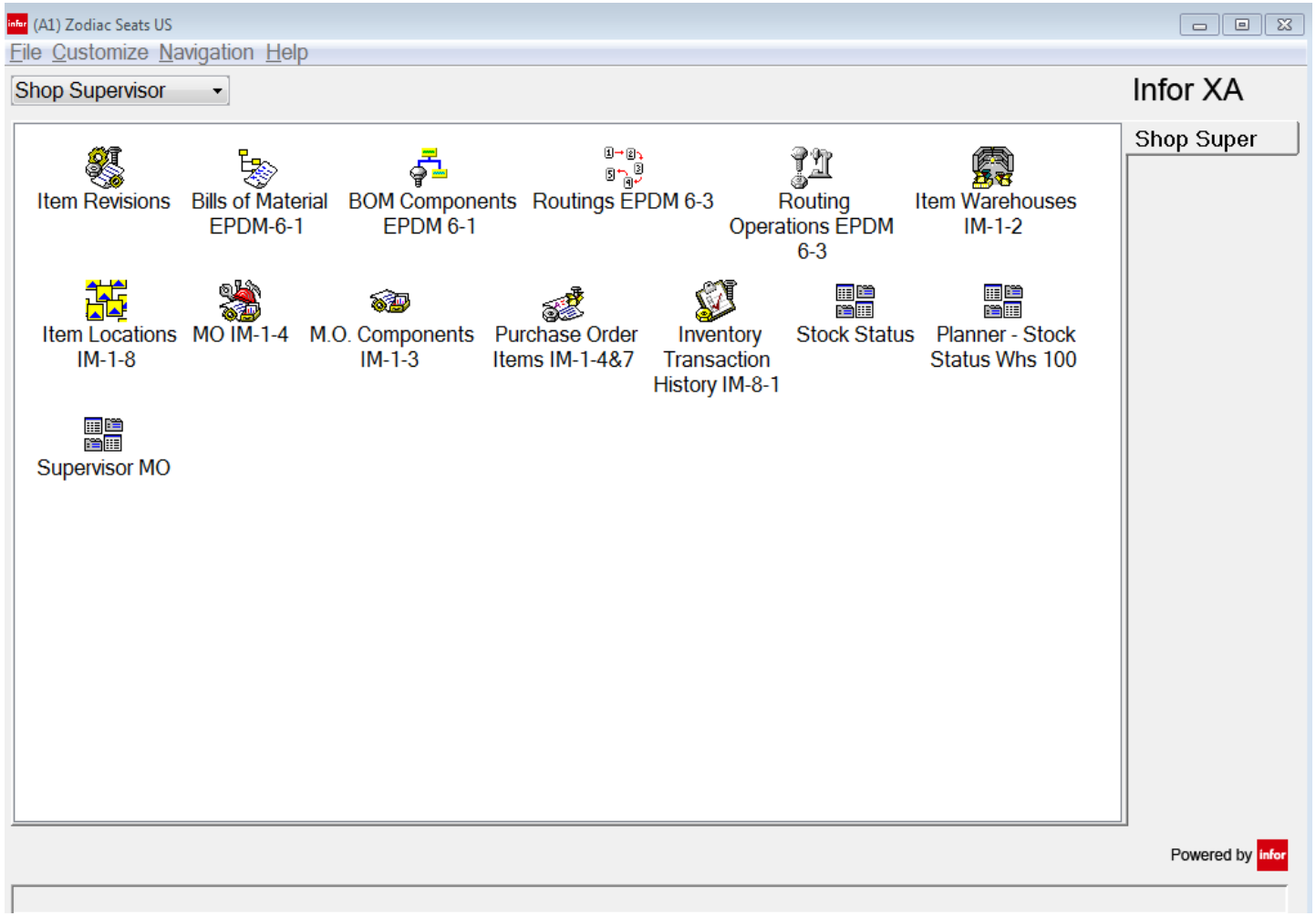
Understanding the options available for the main card file

General information

- When you double click to open PowerLink and log in, the main card file and active card displayed is determined by your System Preference settings
  - HINT: Create different card files for different departments
- The icons on the cards are referred to as ‘Objects’
  - These can be XA files, Workbenches or Workspaces
- IT can use Enterprise Integrator to create new objects over both XA files and non-XA files (access data files, user created files, etc.)


Card File
(IP) Infor XA Power-Link
File Customize Navigation Help
CISTECH DEFAULT
Warehouses
Warehouse Locations
Items
Item Warehouses
Item Locations
Discrete Allocations
Inventory Transaction History
Inventory Count Groups
Inventory Statuses
Transaction Reasons
Transaction Code Descriptions
Inventory
Shipping
Receiving
AM Plus
Customer Service
Engineering
Materials
Production
Finance
Procurement
Environment
Integrator
RF Physical Inventory
RF Pick/Pack/Ship
Product Structure Display
Powered by infor
Cards

Alternate Card File for PowerLink



- Shop Supervisors worked only in green screen
- To help them transition, I created a single card with the objects to replace the inquiries they used in green screen
- Set the label of the object to include the green screen ‘path’
- Added Workbenches to allow them to use a ‘Dashboard-like’ set of windows to facilitate inquiry
- Used System Preferences to make this the Shop Floor Supervisor’s default card file & card

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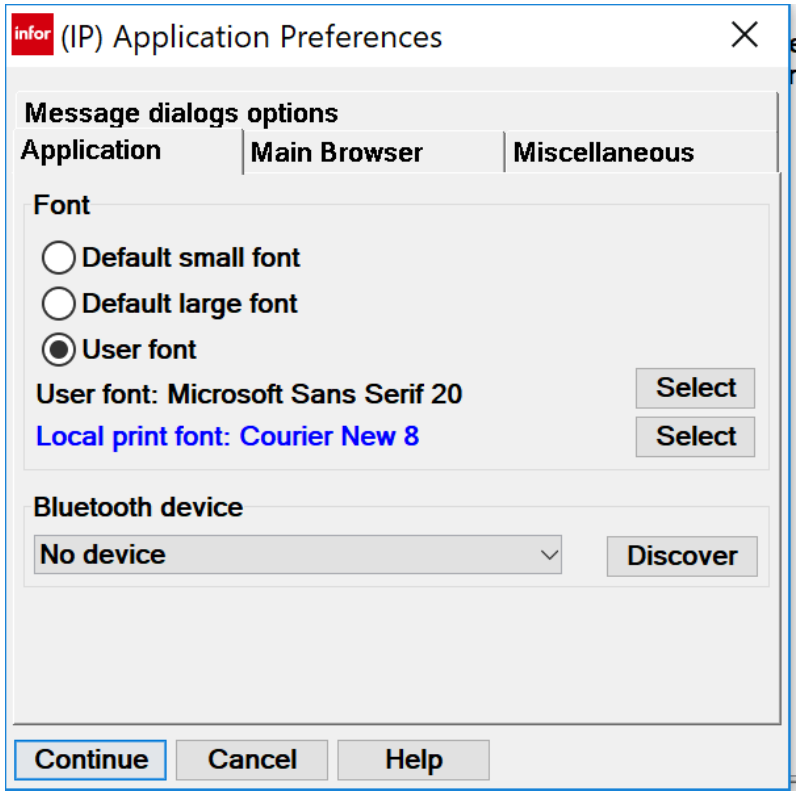
Setting Application Preferences



- Access Preferences from the ‘Customize’ pull down menu
- ‘Application’ card defines font
  - Small is the installed default font
- Use the ‘User Font’ option to set unique font size, bold, *italics*, etc.
  - HINT: Make the test environment font different from the live environment so that it’s clear which environment you’re in

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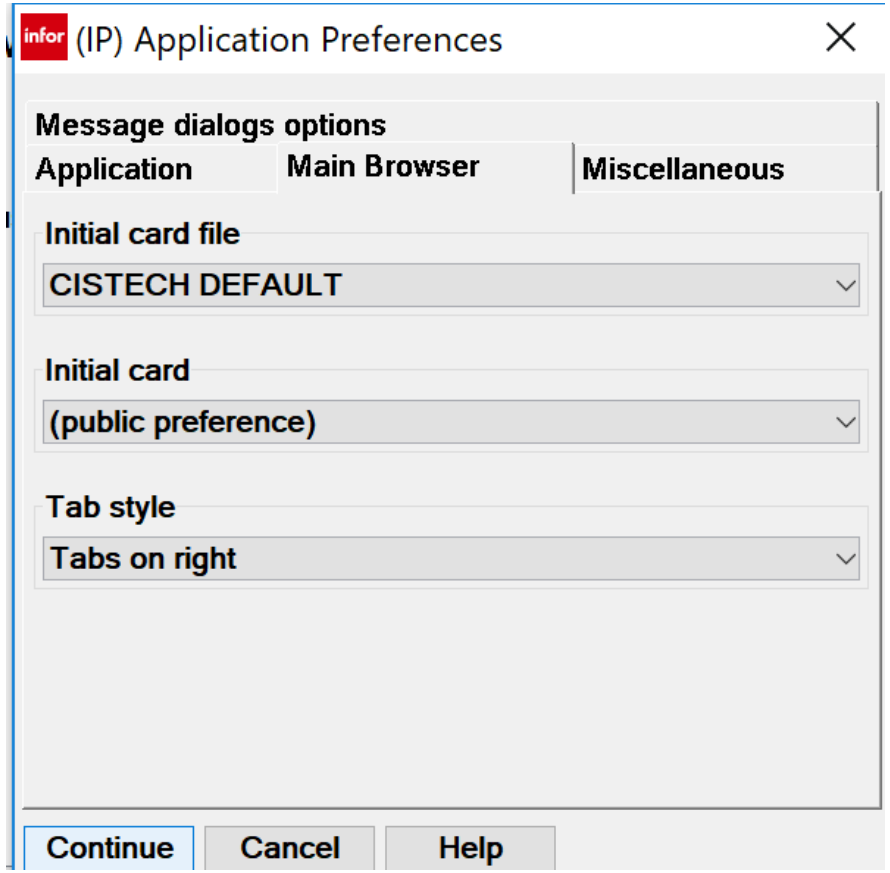
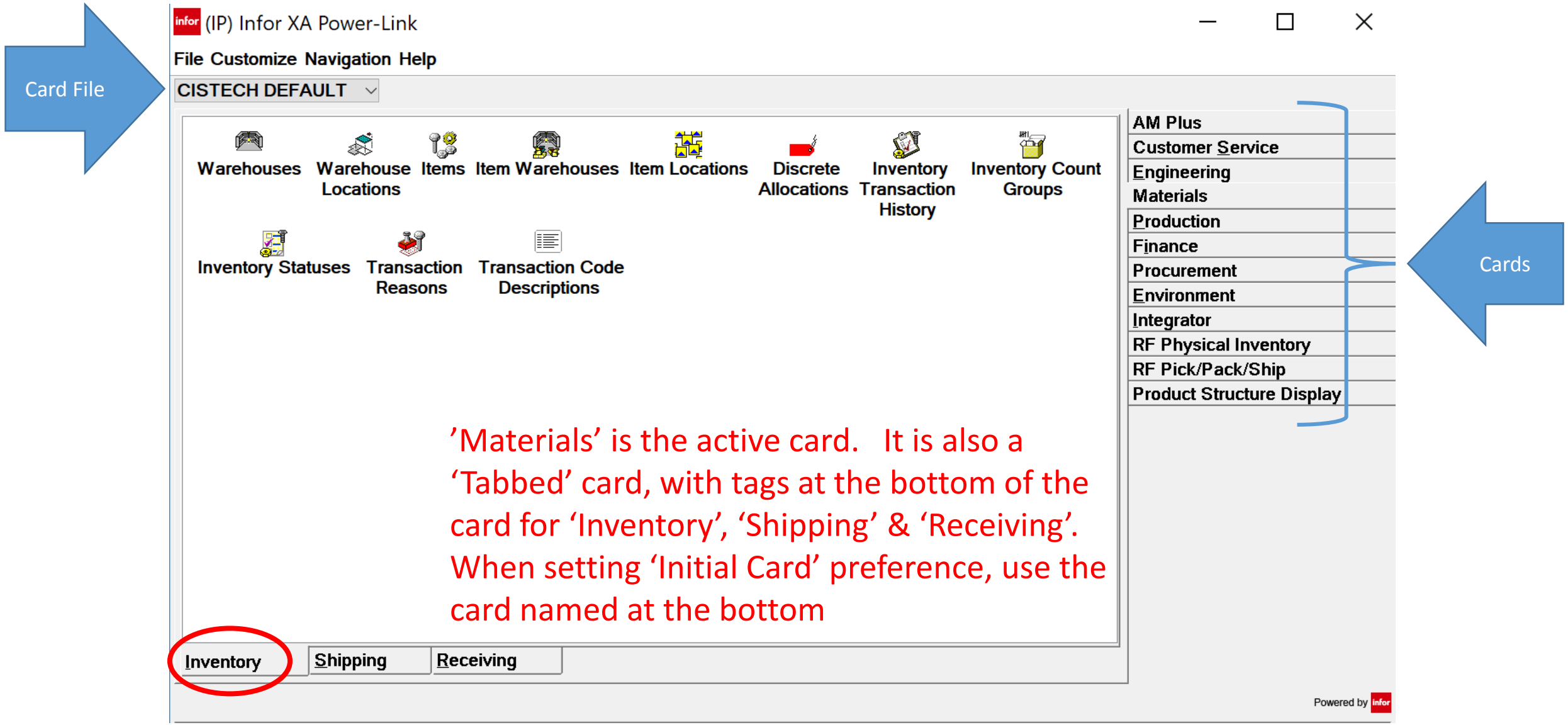
Setting application Preferences



- Main Browser Preferences
  - 'Initial Card File' defines the card file that will be displayed when signing on
  - 'Initial Card' sets the active card
    - HINT: This won't work if you set a tabbed card as the Initial card
    - In a previous slide, the 'Materials' card was identified as a tabbed card. This would NOT be set as the initial card, instead set:
      - Inventory
      - Shipping
      - Receiving
      - As the initial card
  - 'Tab Style' determines where the tabs are for the main PowerLink card file only


Card File
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Warehouses
Warehouse Locations
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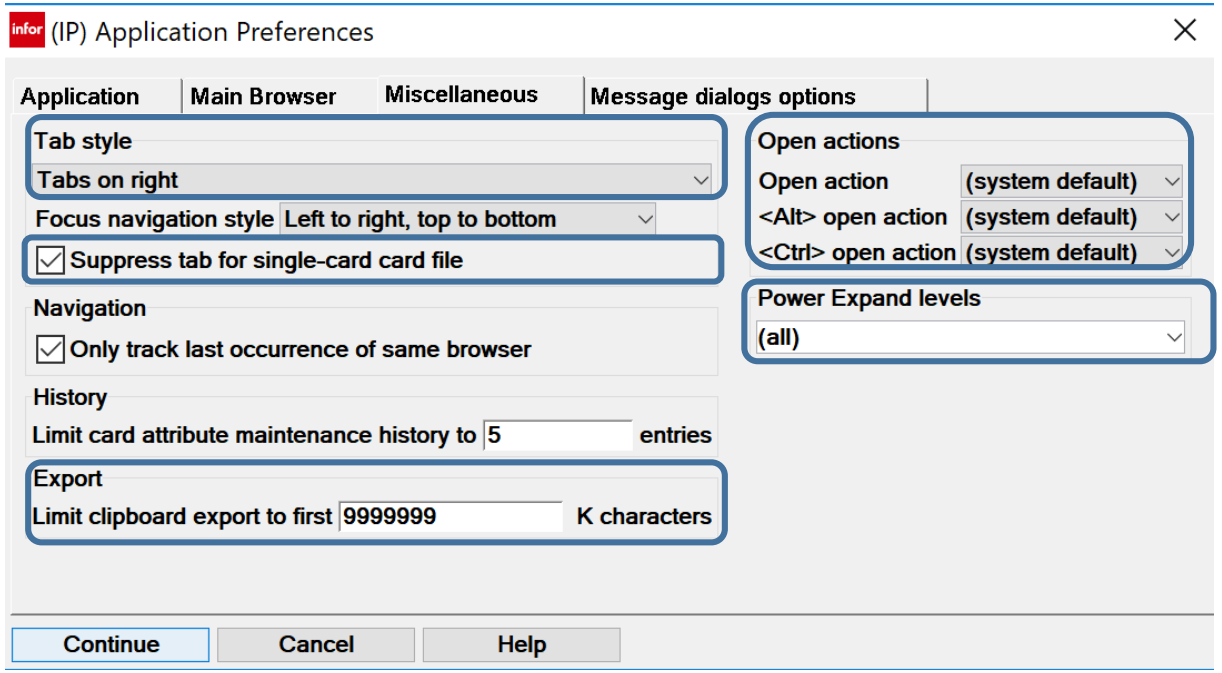
Transaction Reasons
Transaction Code Descriptions
AM Plus
Customer Service
Engineering
Materials
Production
Finance
Procurement
Environment
Integrator
RF Physical Inventory
RF Pick/Pack/Ship
Product Structure Display
Cards
'Materials' is the active card. It is also a 'Tabbed' card, with tags at the bottom of the card for 'Inventory', 'Shipping' & 'Receiving'. When setting 'Initial Card' preference, use the card named at the bottom
Inventory
Shipping
Receiving
Powered by

Setting application Preferences



- 'Tab Style' determines where the tabs are for any card file that is opened by double clicking on a line in a list (i.e. every other file in PowerLink)
- Suppress tab for single-card card file
- 'Export' controls the size of the clipboard when exporting data from PowerLink to paste in another application (i.e. Excel)
- 'Open Actions' determine what happens when you double click on a line in a list
  - Open in inquiry mode
  - Open in change mode, etc.
- Power Expand
  - Used for 'explosion' cards such as an indented BOM to open the card fully exploded

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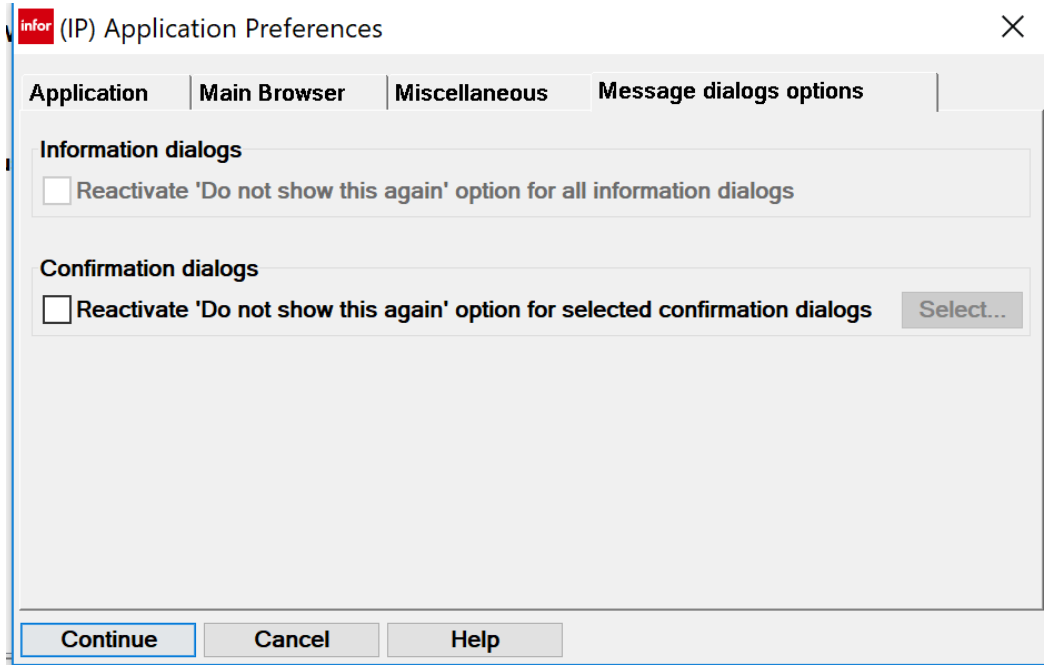
Setting application Preferences



- Message dialog options
- Allows the user to activate the ‘Do not show this again’ option for information and confirmation windows that open

Lists

Double clicking on an object will open a list of records.

This section will explain the options in a list: view, subset, sort & tool bar

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List

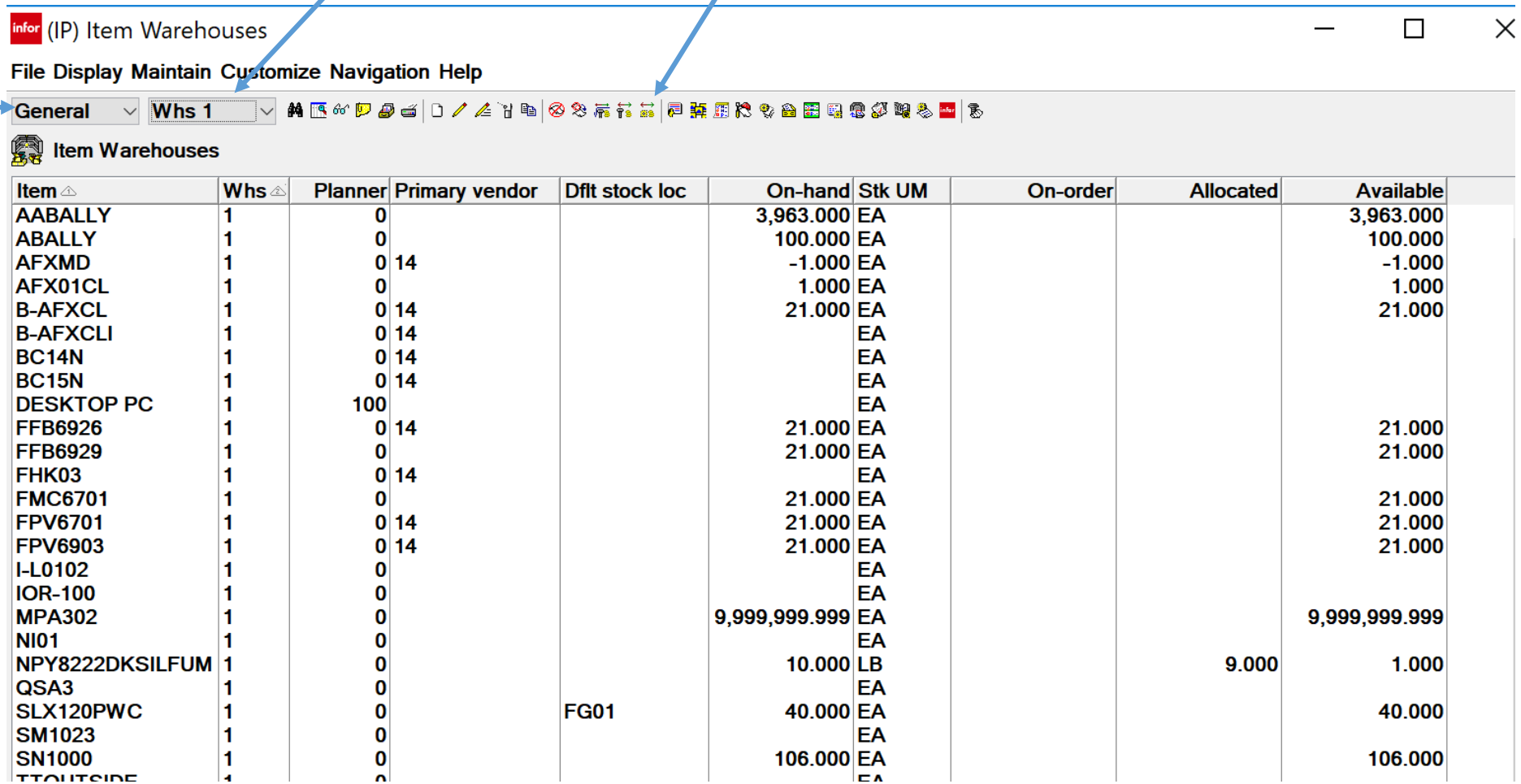
- A list is made up of 3 separate elements:
  - VIEW
    - Defines the colums that will be displayed across the list
    - The view that's used will be the basis for the temporary card that a 'Quick Change' action will build
  - SUBSET
    - A subset works like a filter in Excel or a 'select records' statement in a query to limit the rows of information displayed
  - SORT
    - The sort defines how the records in the subset are sorted
    - If using the 'Locate' button (or 'Ctrl + F' or 'Ctrl + L') to jump to a specific record, the fields used for the sort will be the fields display in the Locate window
- There is no 'linkage' between view & subset. You can use any view with any subset

Sample List

Subsets

Tool Bar Buttons

Views



Item	Whs	Planner	Primary vendor	Dflt stock loc	On-hand	Stk UM	On-order	Allocated	Available
AABALLY	1	0			3,963.000	EA			3,963.000
ABALLY	1	0			100.000	EA			100.000
AFXMD	1	0	14		-1.000	EA			-1.000
AFX01CL	1	0			1.000	EA			1.000
B-AFXCL	1	0	14		21.000	EA			21.000
B-AFXCLI	1	0	14			EA			
BC14N	1	0	14			EA			
BC15N	1	0	14			EA			
DESKTOP PC	1	100				EA			
FFB6926	1	0	14		21.000	EA			21.000
FFB6929	1	0			21.000	EA			21.000
FHK03	1	0	14			EA			
FMC6701	1	0			21.000	EA			21.000
FPV6701	1	0	14		21.000	EA			21.000
FPV6903	1	0	14		21.000	EA			21.000
I-L0102	1	0				EA			
IOR-100	1	0				EA			
MPA302	1	0			9,999,999.999	EA			9,999,999.999
NI01	1	0				EA			
NPY8222DKSILFUM	1	0			10.000	LB		9.000	1.000
QSA3	1	0				EA			
SLX120PWC	1	0		FG01	40.000	EA			40.000
SM1023	1	0				EA			
SN1000	1	0			106.000	EA			106.000

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Toolbar Buttons

- **Create/Add** is the button with the blank sheet of paper
- **Change** is the button with the pencil
- **Quick Change** is the button with the pencil with trailing lines
  - Quick change will build a temporary card based on the view being displayed
  - Maintainable fields will be open for change
  - Use the 'Auto Advance' option (lower left corner of the card) to move automatically to the next item/order
  - If all items/orders have the same field being changed to the same value, use a change template so you don't have to key the information into each field
- **Delete** is the button with the trash can
- **Copy** is the button with the 2 sheets of paper with text

PowerLink buttons

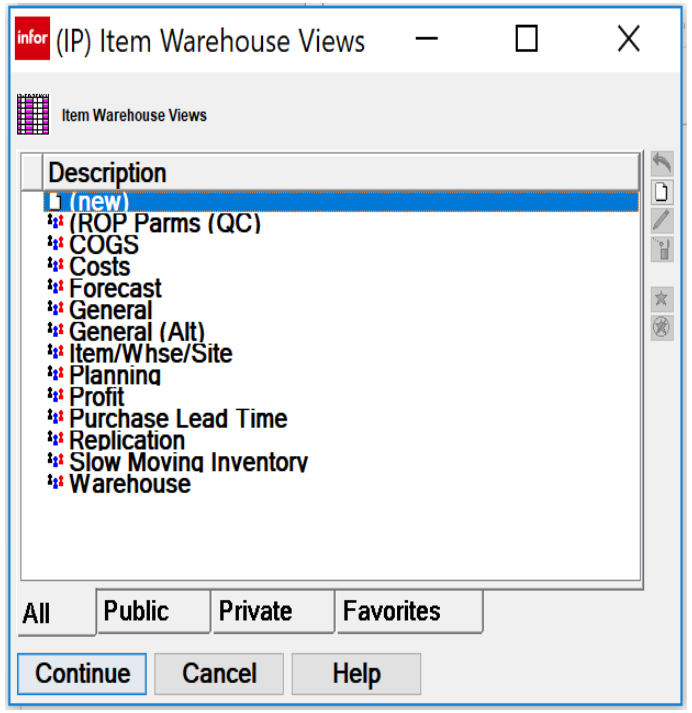
- **A Calendar** is available for date fields
    - You can key the date manually or select from the calendar
- **A Magnifying Glass** button will allow you to search on the field
  (Like using F4 or ? in green screen)
- **Right Justify** (same as using the + key/field exit in green screen)
- **Open a locked field** (such as 'Ship To' Name/address use this button to unlock
- **Search/Locate** a record use the button with the spreadsheet & magnifying glass

Creating a List

Customizing A view

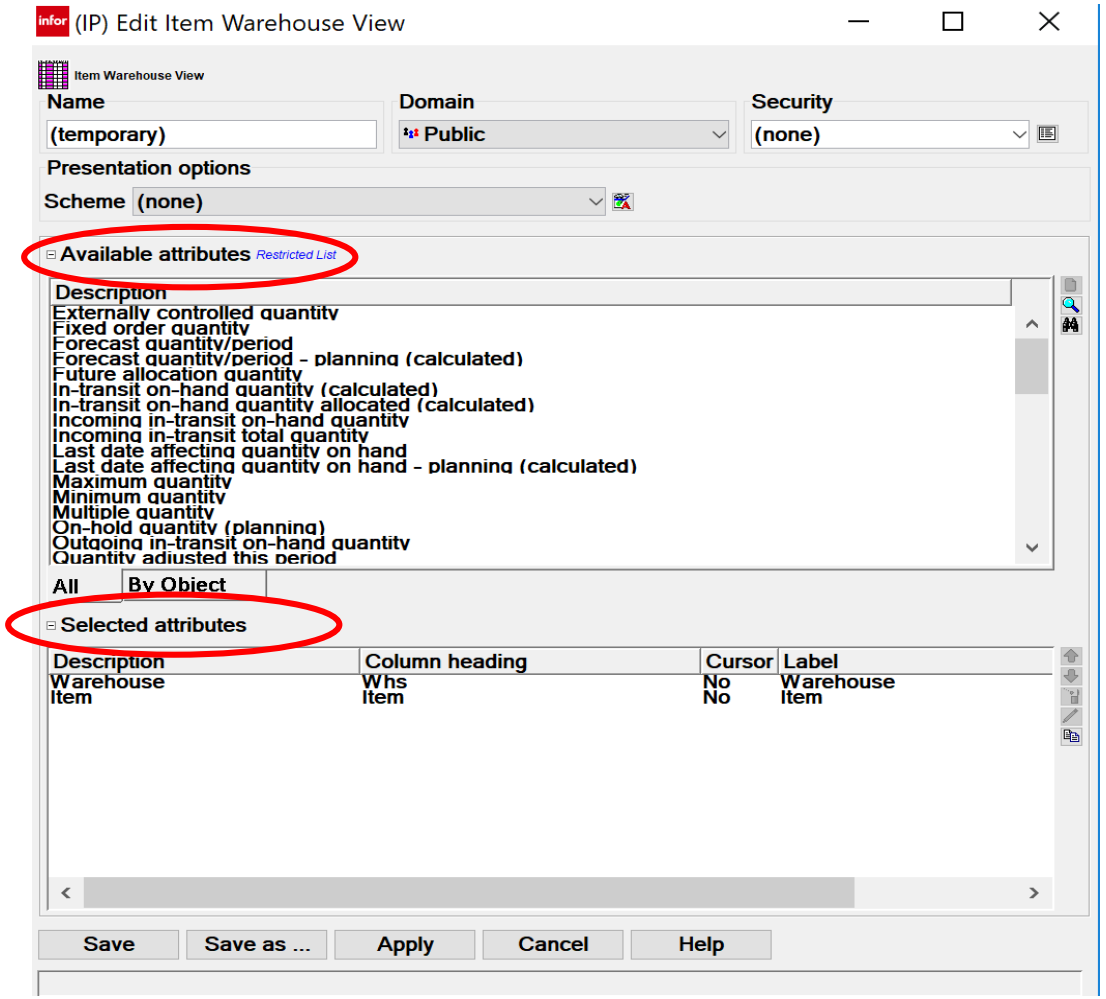
- Use the ‘Customize’ option from the Menu bar and select ‘View’
- The view controls what information is in each column

Customizing a View



- When creating a new view, a list of existing views will be displayed
  - Click on the 'Create' button With an existing view highlighted and the existing view will be copied
  - NOTE: Infor ships PowerLink with their views, subsets, cards, etc. YOU SHOULD NOT CHANGE THESE since new versions can replace them and you would lose your changes! For example, single click on General then click the 'Create' button to copy general and save it with a different name
  - Double click on 'New' at the top of the list to begin a new view from scratch

Customizing a View



- When customizing a view, the '**Available Attributes**' section will show all fields from all files
- Select a field by double clicking on the field
- It will drop to the bottom of the list UNLESS you have single clicked (i.e. highlighted) a field in the '**Selected Attributes**' section
  - If there is a highlighted field in Selected Attributes, PowerLink will add the new field immediately below the highlighted field
  - To UN-HIGHLIGHT a field, hold the 'Ctrl' key and single click on the record

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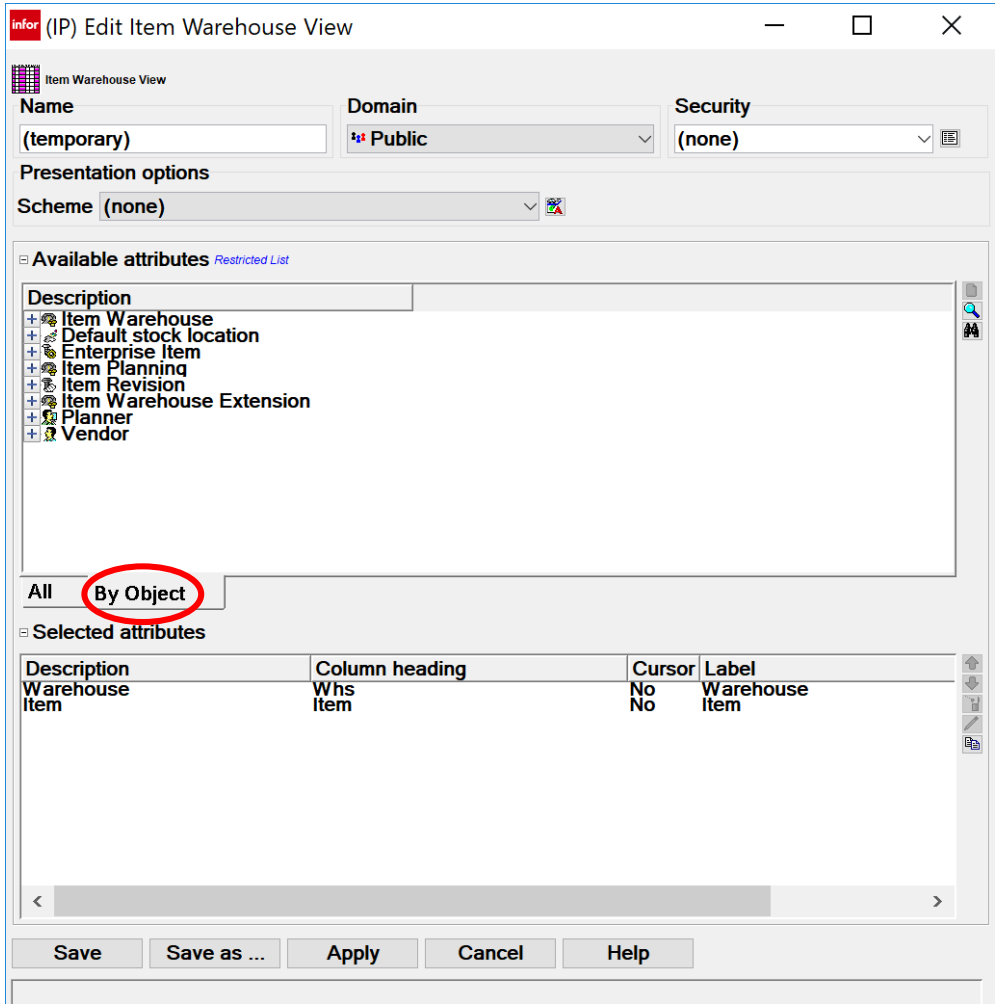
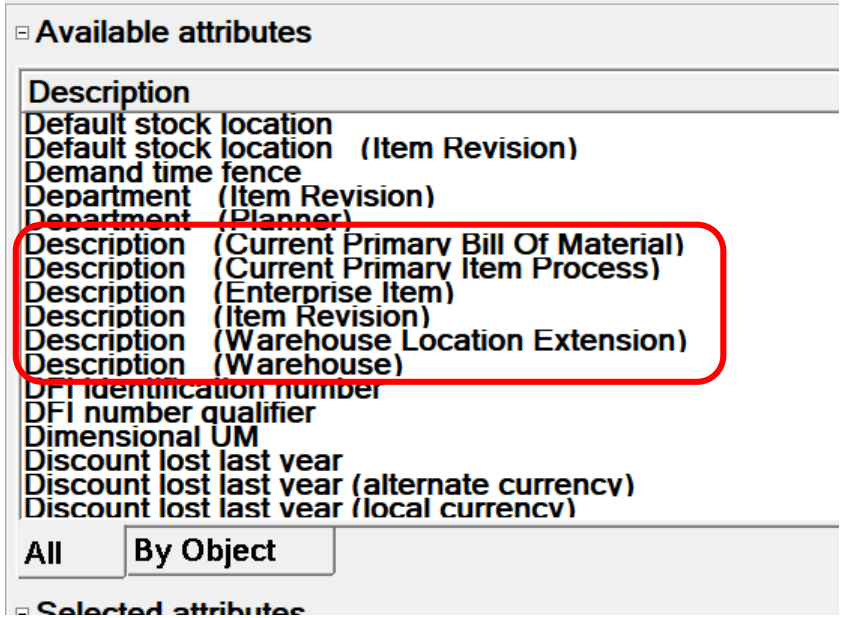
Customizing a View



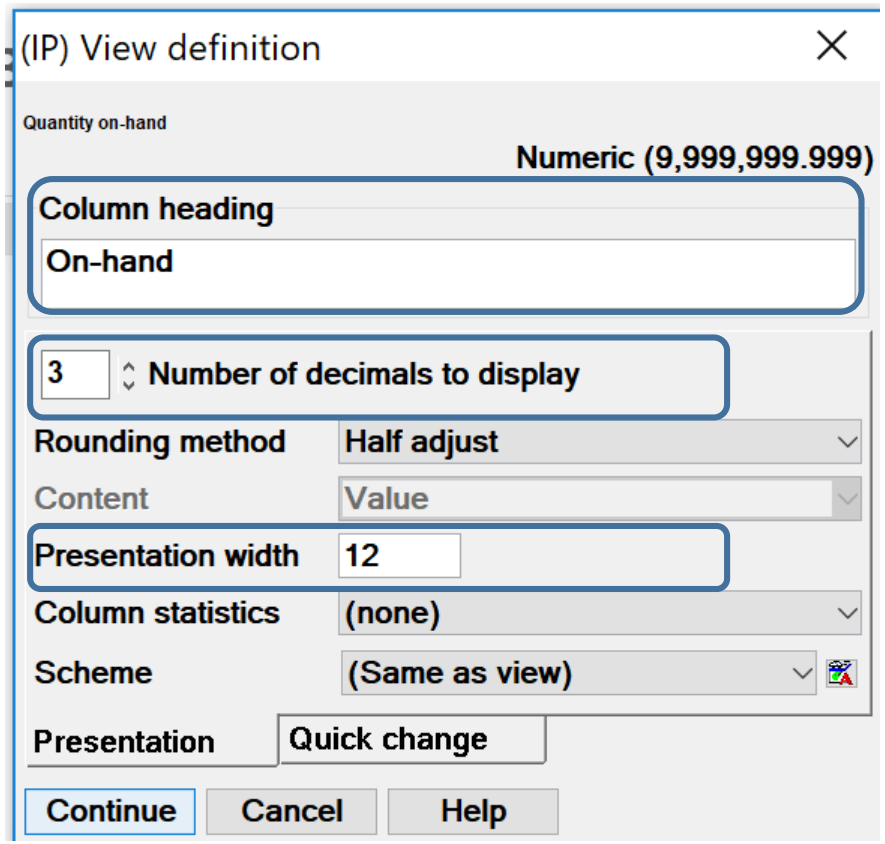
- If you want to select the file that they field comes from, click on the ‘By Object’ tab
- Click on the + sign to the left of the file name and only the fields from that file will be displayed

Customizing a View



- When you see the same field listed multiple times in the view, it means that the same field name exists in multiple records
  - The field name with no parenthesis means that it's coming from the primary file
    - The example to the right is from the Item Warehouse (Balance) record, there is no 'Description' field in that record, but, if there were, it would be displayed without anything following in parethesis
  - The file name in parenthesis after the field name is showing the file name that the field is from

Customizing a View



- When adding a field to the view you can change the:
  - Column Heading
    - NOTE: changing the column heading does not change the field description, it only changes the label for the column in the view
    - If you want a 2 or 3 line Column Heading, hold Ctrl and press Enter to go to the next line
  - Number of decimals
    - NOTE: change the decimals does not affect the data only the number of decimals in the view
  - Width of the field
    - To fit more fields on the screen, you may want to change the width of the fields. The default number is the number of characters in the field definition which is displayed in the upper right corner

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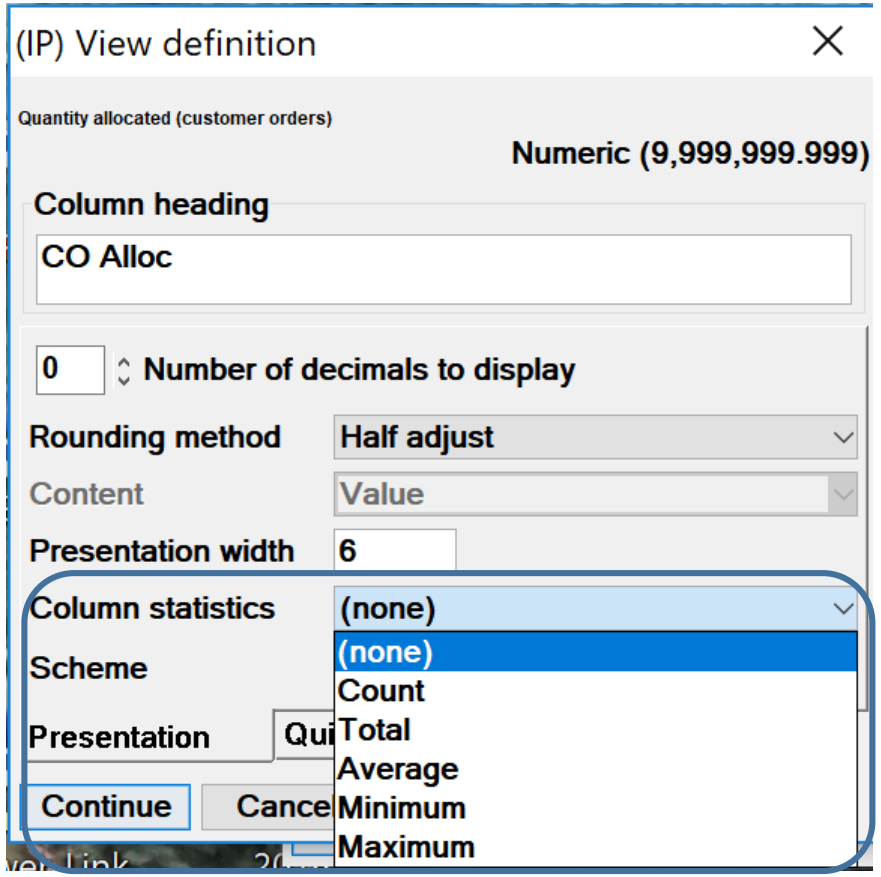
Customizing a View



- Column Statistics
  - For numeric fields, there are 6 options that can be selected (only 1 can be selected for a column)
    - No statistic
    - Count the number of records (also available for Alpha-Numeric fields)
    - Sum the values in the column
    - Calculate an average
    - Show the lowest number (minimum)
    - Show the highest number (maximum)
  - If you select a statistic and it doesn't display at the bottom of the column, click 'File' then 'Calculate Column Statistics' from the list

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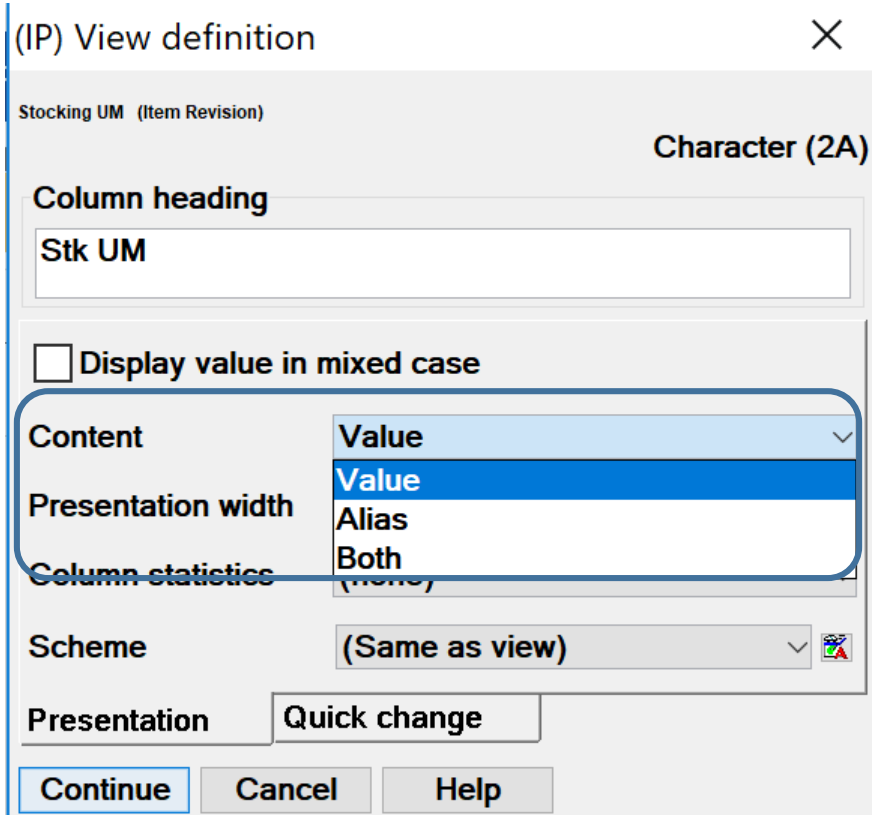
Customizing a View



- When adding a field that is a code file (i.e. Item Class) you can specify that, for the view, you want the:
  - VALUE – 4 character code
  - ALIAS – description of the code
  - BOTH – both value and alias
- There are also XA defined fields (Item Type) that provide the same options

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Sample List with new view

(IP) Item Warehouses

File Display Maintain Customize Navigation Help

Conf Pre... | Whs 1

Item Warehouses

Whs	Item	Description	Stk UM	On-hand	MO Qty	PO Qty	CO Alloc	MO Alloc	On-hand $
1	1100	Processor, 166 Mhz	EA = Each	9,990.000	0	0	4	0	3,327,703.96
1	1100OC	Stepping Stones	EA = Each	1,000,000.000	0	0	0	0	0.00
1	1101	PROCESSOR, 200	EA = Each	772.000	0	0	14	0	347,850.46
1	1101OC	Concrete	EA = Each	0.000	0	0	0	0	0.00
1	1102	PROCESSOR, 200	EA = Each	913.000	0	0	4	0	647,064.56
1	1102OC	SAND	EA = Each	0.000	0	0	0	0	0.00
1	1103	PROCESSOR, 3XC	EA = Each	813.000	0	0	0	0	619,713.31
1	1104	SPEAKERS	EA = Each	16,225.000	0	900	516	0	1,025,582.25
1	1105	MOUSE	EA = Each	7,670.000	0	0	135	0	91,963.30
1	1106	KEYBOARD	EA = Each	9,983.000	0	0	32	0	313,965.35
1	1107	KEYBOARD ERGO	EA = Each	14,885.000	0	0	702	0	530,650.25
1	1108	MOUSE ERGO	EA = Each	81.000	0	0	11	0	1,057.05
1	1109	MOUSE PAD	EA = Each	49,980.000	0	0	0	0	49,980.00
1	1110	SOFTWARE, WIN 95	EA = Each	1,000.000	0	0	0	0	29,000.00
1	1111	SOFTWARE, WIN 98	EA = Each	10,000.000	0	0	0	0	890,000.00
1	1112	SOFTWARE, WIN NT CLIENT	EA = Each	20,000.000	0	0	0	0	5,980,000.00
1	1113	SOFTWARE, WIN NT SERVER	EA = Each	10,000.000	0	0	0	0	10,990,000.00
1	1114	PROCESSOR, 4XC	EA = Each	10,000.000	0	0	0	0	7,622,550.00
1	1115	PROCESSOR, 45X	EA = Each	10,000.000	0	0	0	0	7,622,550.00
1	1200	MOTHERBOARD, Type I	EA = Each	9,995.000	0	0	5	0	1,971,698.66

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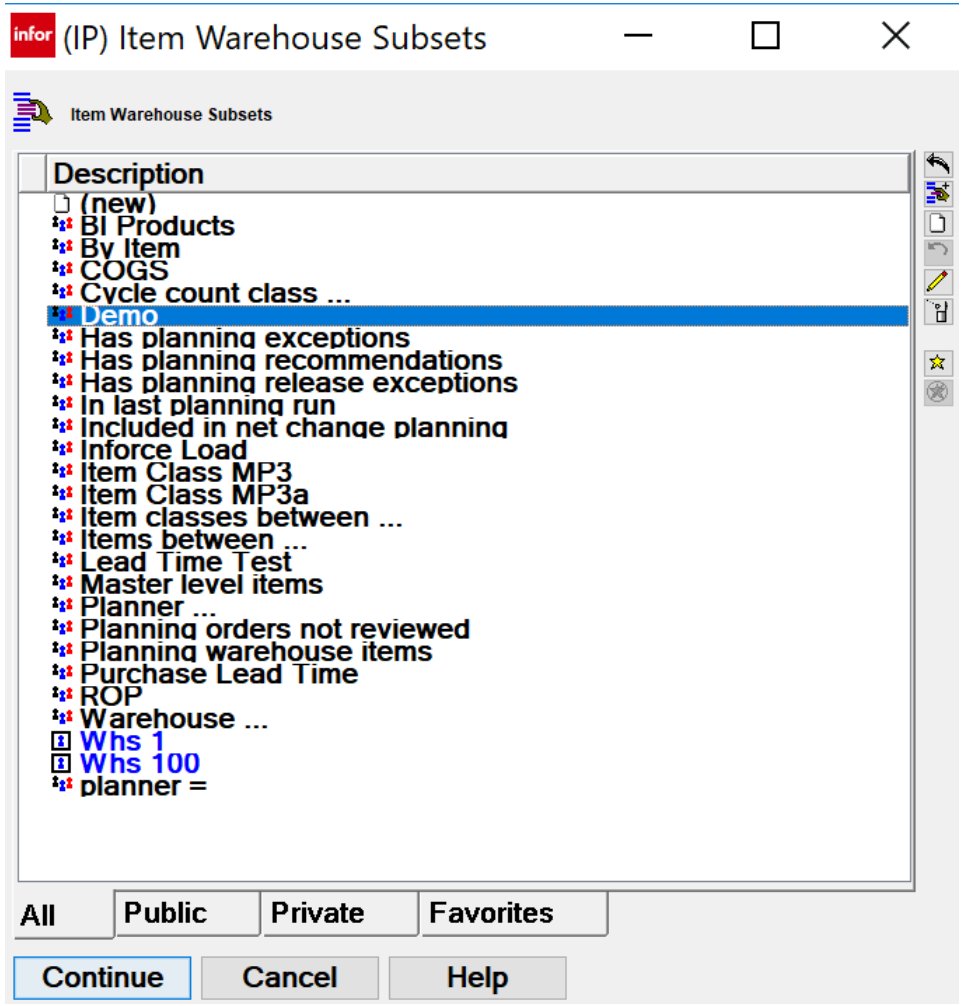
Subsets

Creating a Subset

- Subsets limit the ROWS of data to be included.
- They are similar to a filter in Excel or a ‘Select Records’ statement in a query
- The actions to create a subset are similar to the actions to create a view
- There can be multiple fields in a subset joined by either ‘And’ or ‘Or’
  - Using the ‘Or’ option means that you are starting over.
    - For example, if I wanted all records in warehouse 1 with a quantity on hand for Item Classes A or B, my statement would read
      - Warehouse = 1
      - And Quantity on hand not equal to 0
      - And Item Class = A
      - OR Warehouse = 1
      - And Quantity on Hand not equal to 0
      - And Item Class = B
    - For those of you who are trying to tell me now that I could have used a list in the Item Class field, I’m aware of that but trying to make a point about how to use an ‘Or’ statement

Customizing a Subset



- The same rules that were explained about views work the same way with subsets
  - Double clicking on ‘New’ at the top of the list starts a new subset
  - Highlighting an existing view and clicking on the create button on the right side will copy the existing view and allow you to make additions, changes or deletes then assign a new name

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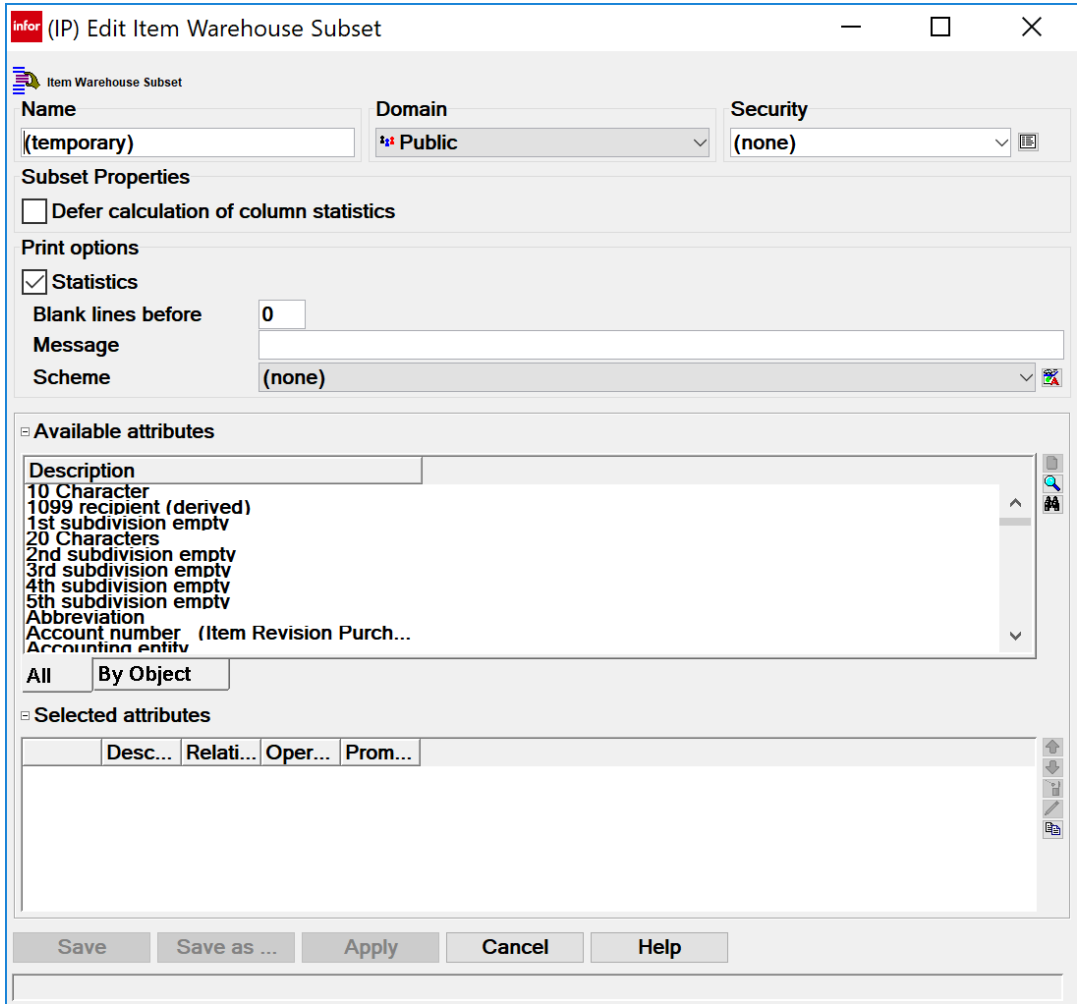
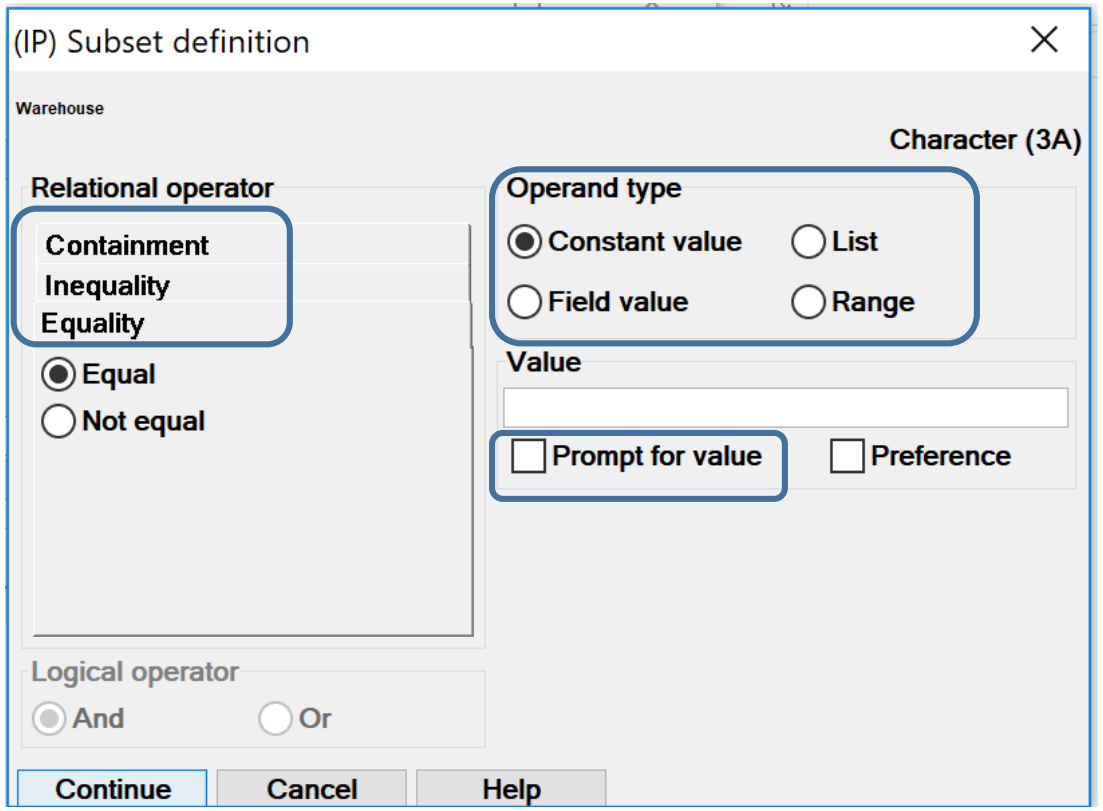
Customizing a Subset



- Fields in the 'Available Attributes' section are selected as criteria for the various filters

Customizing a Subset



- There are multiple 'cards' on the left side of the window to choose from:
  - Equality
  - Inequality (greater than/less than)
  - Containment (contains, begins, ends)
- Operand Type defines
  - Single value
  - Multiple values (list)
  - Range
  - Field Value – select a field from a list
- Value is the information in the record that is being matched
  - Prompt for value will display a pop up window
  - Preference will use the setting in your preferences

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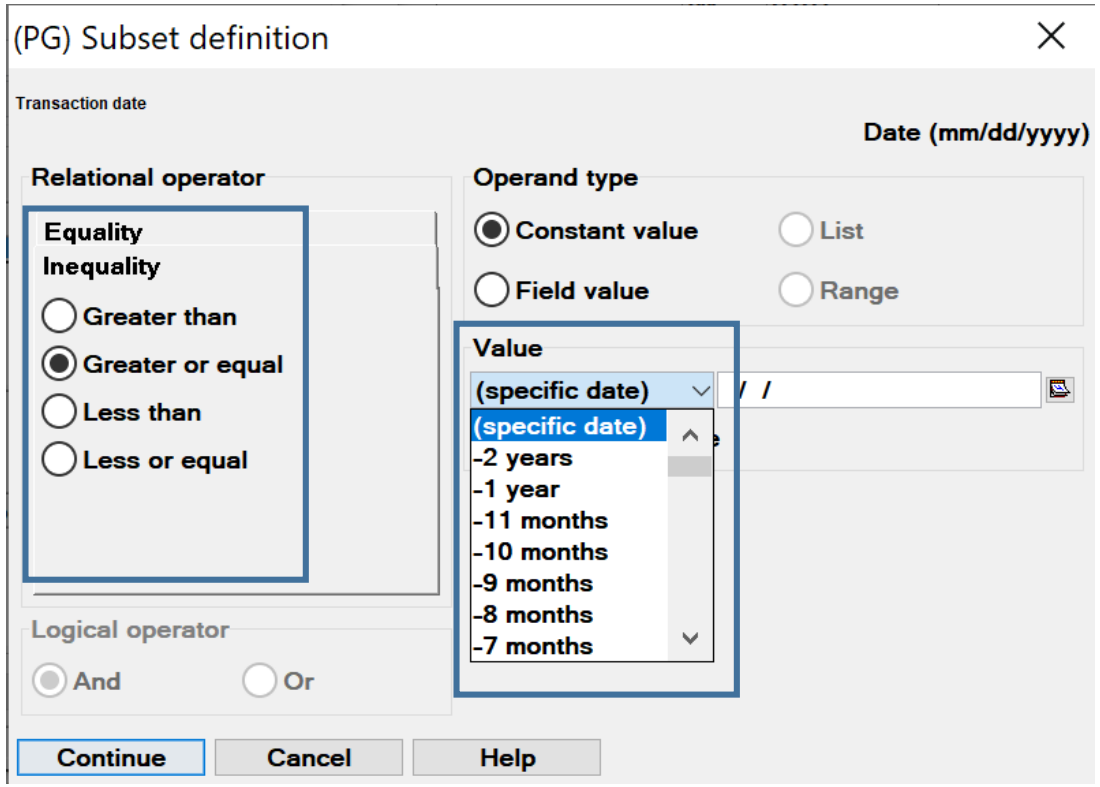
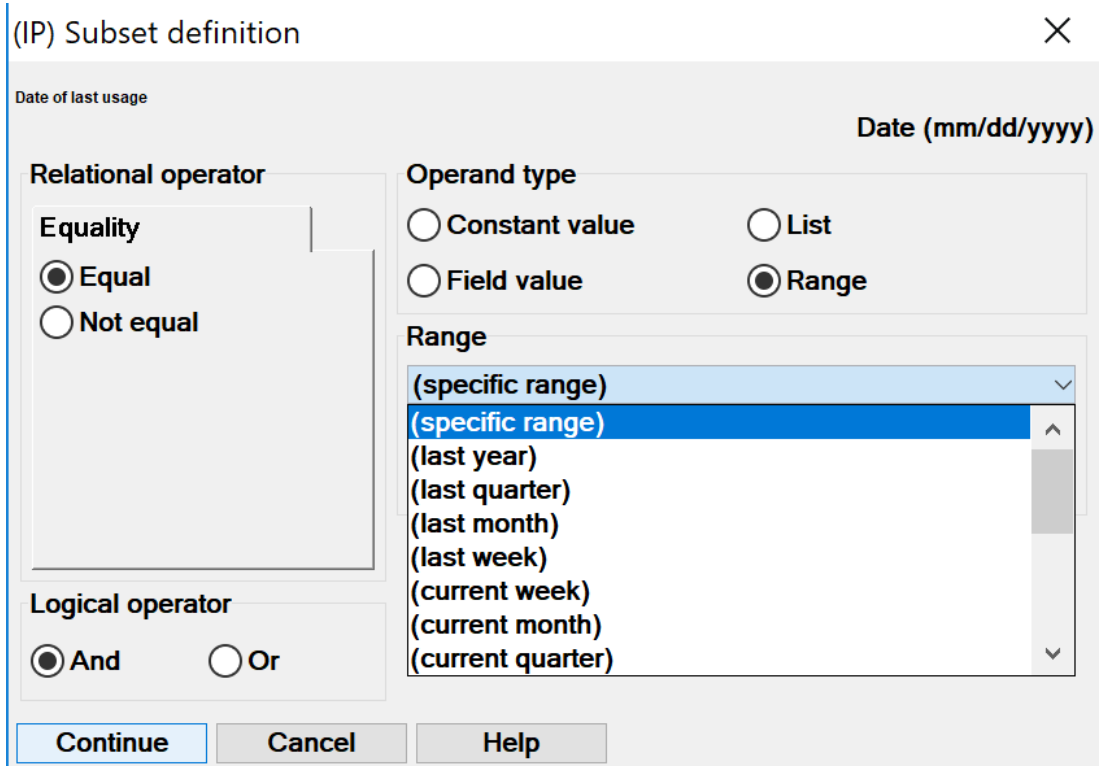
Customizing a Subset



- Using date fields
  - Typically use the 'Inequality' card to select greater or less than to get a range of dates
  - Instead of entering a specific date that you have to constantly change, select a value from a range of -2 years to +2 years
  - As the date on the iSeries/AS400 changes, so will the date in your subset

Customizing a Subset



- If the option for ‘Range’ of dates is selected, the pull down options for the range can provide the same automatic update of date ranges
- If you want to enter the date range manually each time you apply the subset, use the ‘Inequality’ tab
  - Select ‘Greater Than or Equal’ and check ‘Prompt for value’
  - Then add the same date field with ‘Less than or equal’ and check ‘Prompt for value’
  - Each time the subset is applied, the date range window will be displayed

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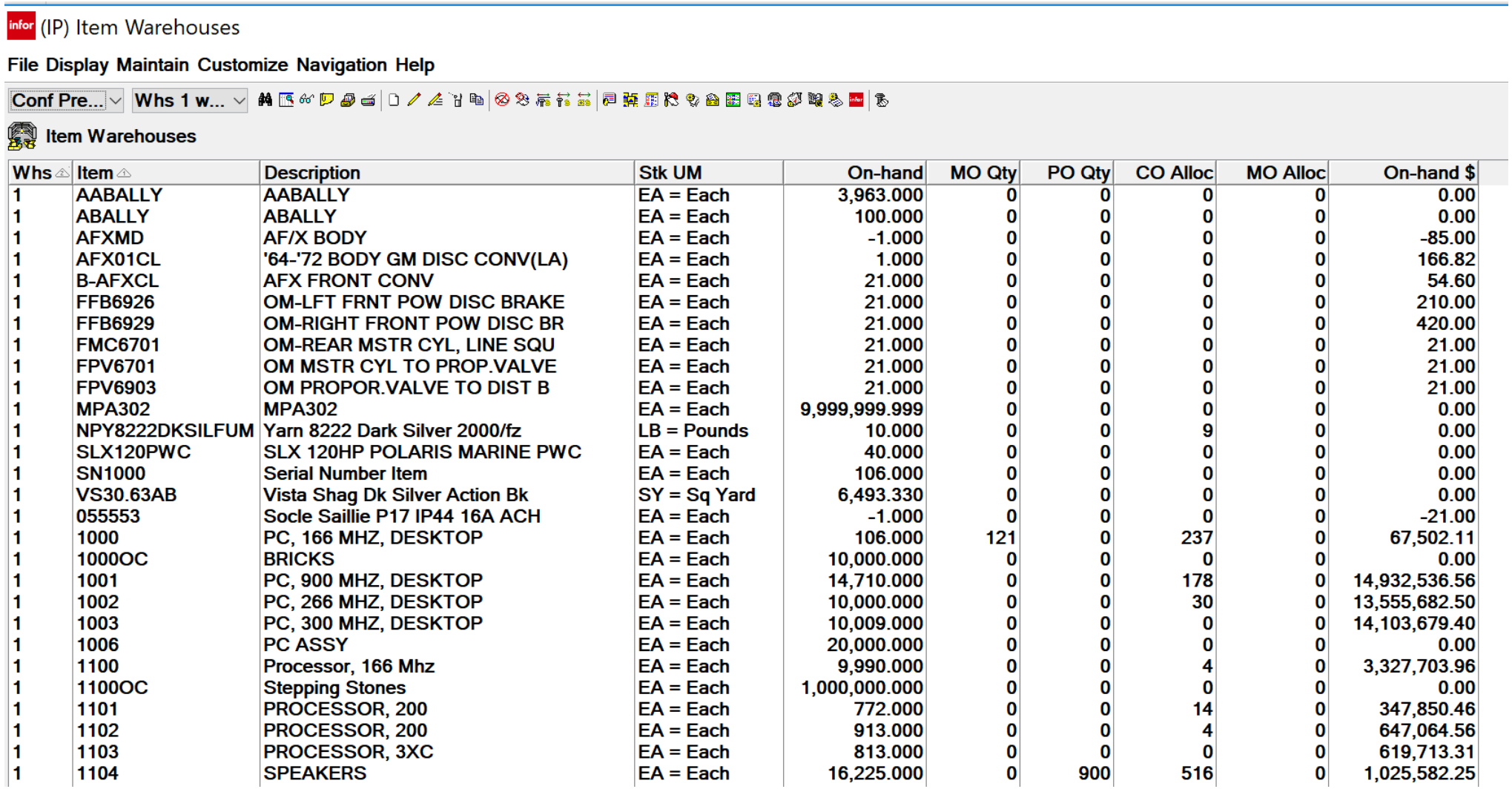
List with Subset of ‘WHSE = 1 & QTY NE 0’


(IP) Item Warehouses

File Display Maintain Customize Navigation Help

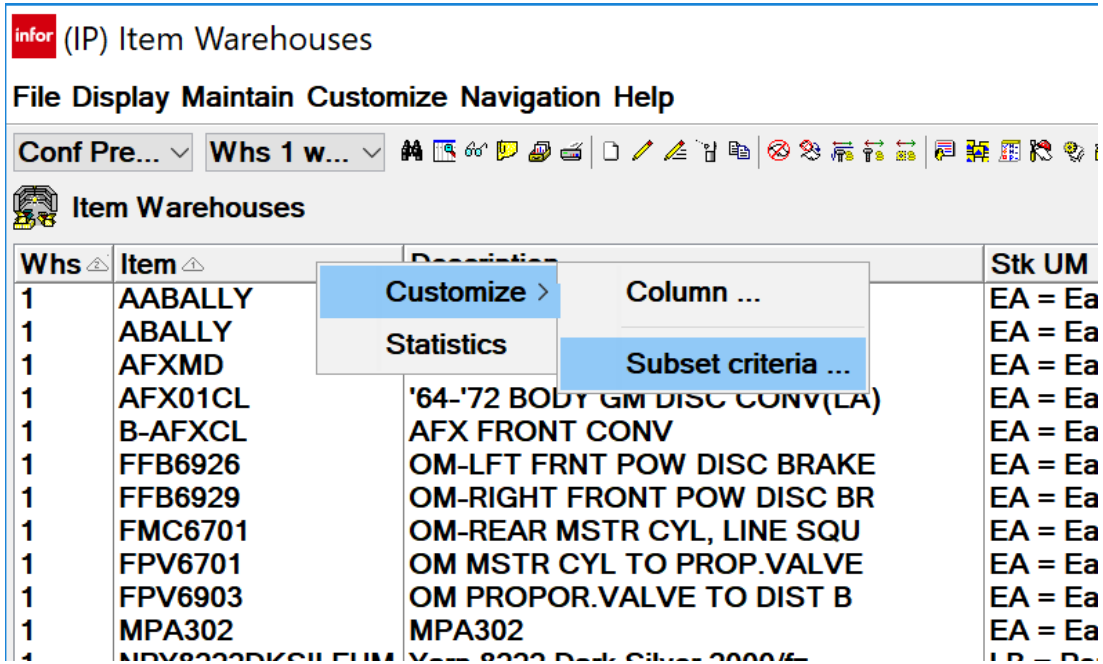
Conf Pre... Whs 1 w...

Item Warehouses

Whs	Item	Description	Stk UM	On-hand	MO Qty	PO Qty	CO Alloc	MO Alloc	On-hand $
1	AABALLY	AABALLY	EA = Each	3,963.000	0	0	0	0	0.00
1	ABALLY	ABALLY	EA = Each	100.000	0	0	0	0	0.00
1	AFXMD	AF/X BODY	EA = Each	-1.000	0	0	0	0	-85.00
1	AFX01CL	'64-'72 BODY GM DISC CONV(LA)	EA = Each	1.000	0	0	0	0	166.82
1	B-AFXCL	AFX FRONT CONV	EA = Each	21.000	0	0	0	0	54.60
1	FFB6926	OM-LFT FRNT POW DISC BRAKE	EA = Each	21.000	0	0	0	0	210.00
1	FFB6929	OM-RIGHT FRONT POW DISC BR	EA = Each	21.000	0	0	0	0	420.00
1	FMC6701	OM-REAR MSTR CYL, LINE SQU	EA = Each	21.000	0	0	0	0	21.00
1	FPV6701	OM MSTR CYL TO PROP.VALVE	EA = Each	21.000	0	0	0	0	21.00
1	FPV6903	OM PROPOR.VALVE TO DIST B	EA = Each	21.000	0	0	0	0	21.00
1	MPA302	MPA302	EA = Each	9,999,999.999	0	0	0	0	0.00
1	NPY8222DKSILFUM	Yarn 8222 Dark Silver 2000/fz	LB = Pounds	10.000	0	0	9	0	0.00
1	SLX120PWC	SLX 120HP POLARIS MARINE PWC	EA = Each	40.000	0	0	0	0	0.00
1	SN1000	Serial Number Item	EA = Each	106.000	0	0	0	0	0.00
1	VS30.63AB	Vista Shag Dk Silver Action Bk	SY = Sq Yard	6,493.330	0	0	0	0	0.00
1	055553	Socle Saillie P17 IP44 16A ACH	EA = Each	-1.000	0	0	0	0	-21.00
1	1000	PC, 166 MHZ, DESKTOP	EA = Each	106.000	121	0	237	0	67,502.11
1	1000OC	BRICKS	EA = Each	10,000.000	0	0	0	0	0.00
1	1001	PC, 900 MHZ, DESKTOP	EA = Each	14,710.000	0	0	178	0	14,932,536.56
1	1002	PC, 266 MHZ, DESKTOP	EA = Each	10,000.000	0	0	30	0	13,555,682.50
1	1003	PC, 300 MHZ, DESKTOP	EA = Each	10,009.000	0	0	0	0	14,103,679.40
1	1006	PC ASSY	EA = Each	20,000.000	0	0	0	0	0.00
1	1100	Processor, 166 Mhz	EA = Each	9,990.000	0	0	4	0	3,327,703.96
1	1100OC	Stepping Stones	EA = Each	1,000,000.000	0	0	0	0	0.00
1	1101	PROCESSOR, 200	EA = Each	772.000	0	0	14	0	347,850.46
1	1102	PROCESSOR, 200	EA = Each	913.000	0	0	4	0	647,064.56
1	1103	PROCESSOR, 3XC	EA = Each	813.000	0	0	0	0	619,713.31
1	1104	SPEAKERS	EA = Each	16,225.000	0	900	516	0	1,025,582.25

CISTECH
THE INFOR XA EXPERTS

Temporary Subset

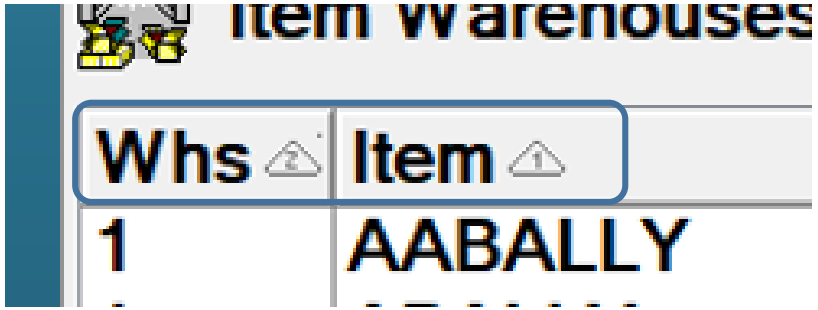


- If you right click on the column heading you will have an option to create a temporary subset for that column
  - The ‘Selection Criteria’ card will be displayed to allow for Equal, Inequality or Containment
- If you use a Temporary Subset, hold the ‘CTRL’ key and press ‘Z’ (i.e. undo) to return to the original subset

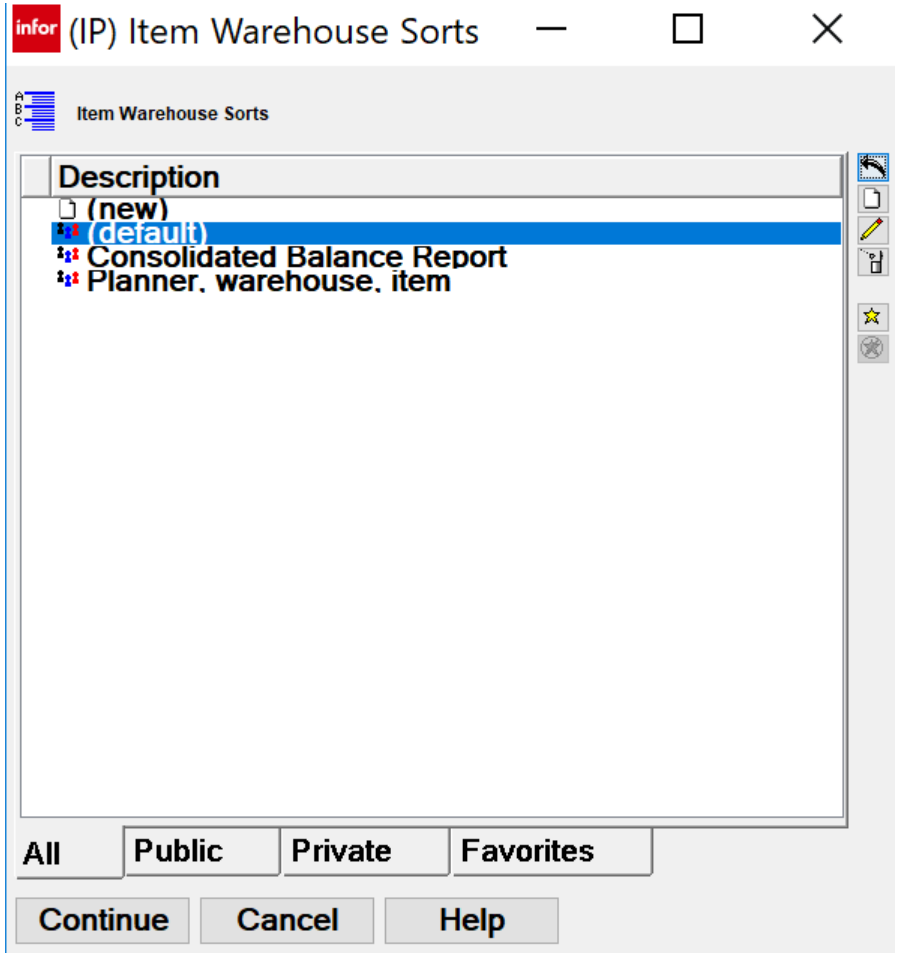
Sorts

Sorts

- Any field can be used to sort the list with
- In the title of the column, the sort fields will have a triangle with a number in the sort fields
  - If the triangle is pointing up, it is an ‘ascending’ sort
  - If the triangle is pointing down, it is a ‘descending’ sort
  - The number in the triangle will designate the first sort field, second sort field, etc.
- You can hover the mouse over the ‘Locate’ button and the sort fields will be displayed

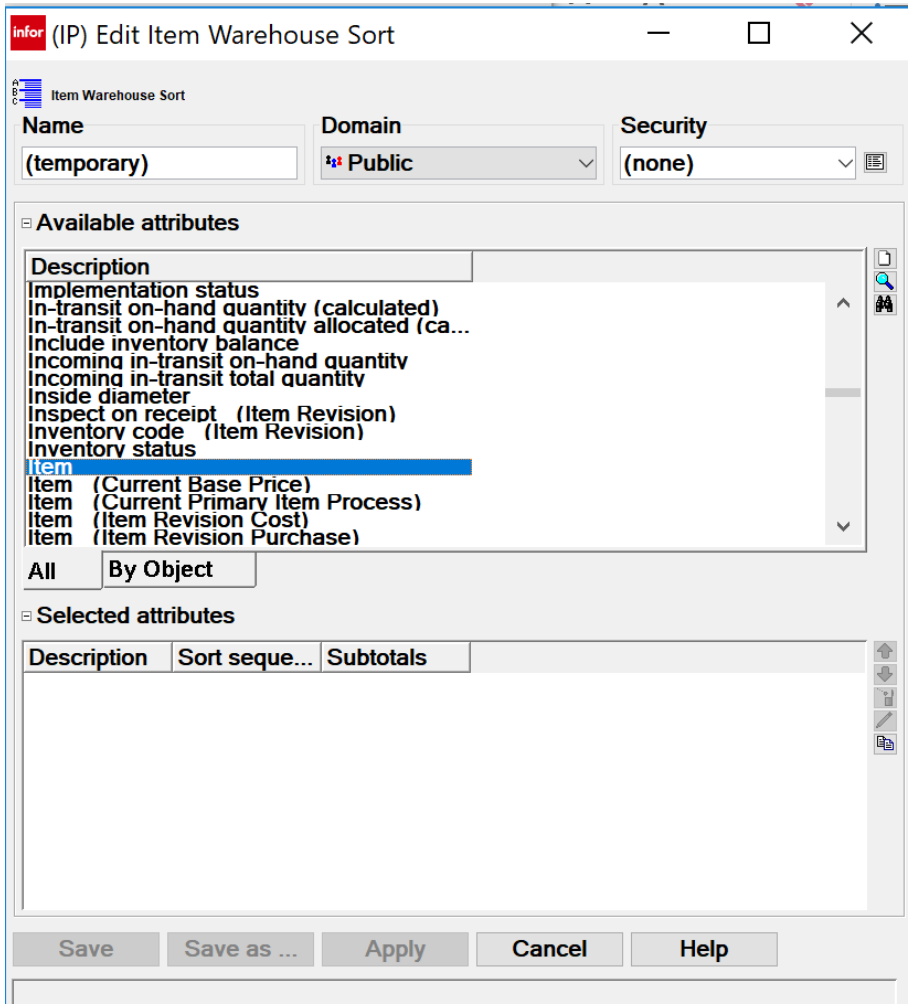


Creating Sorts



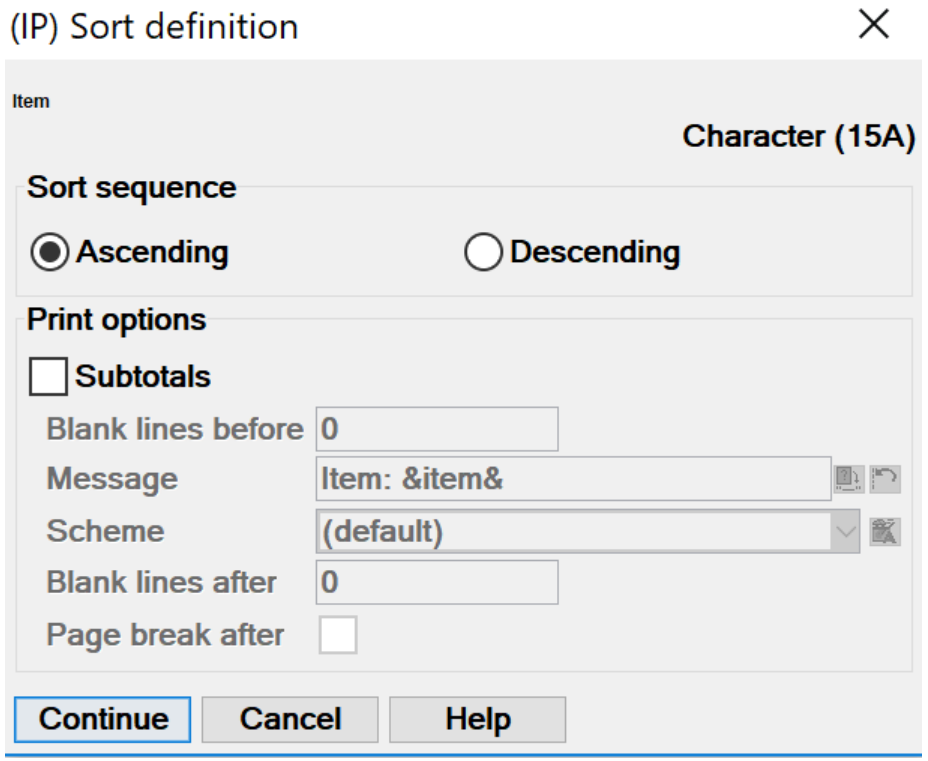
- Again, same process as views and subsets

Creating Sorts



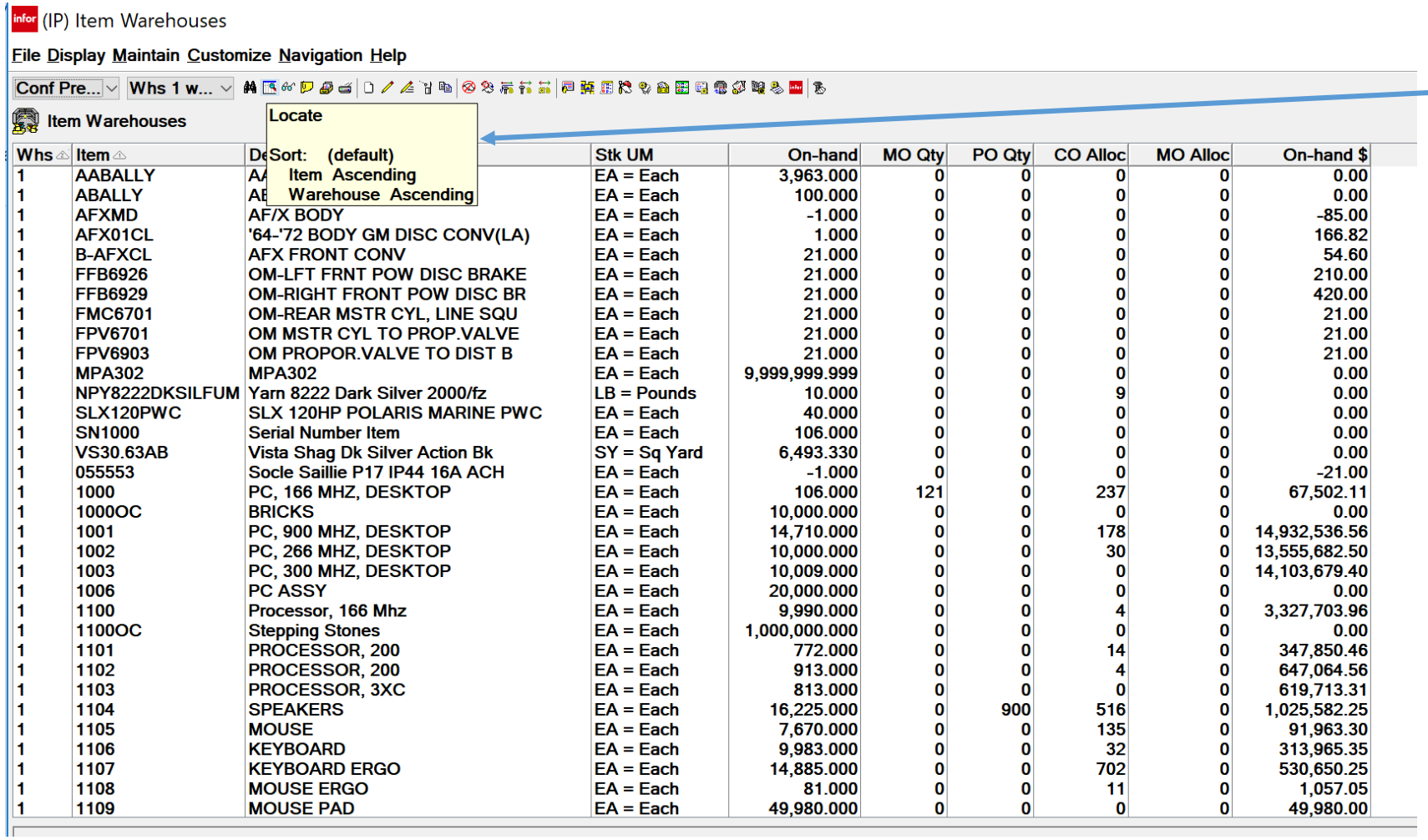
- Multiple fields can be selected for a sort
- The order of the fields in the 'Selected Attributes' section will determine the sort of the list of records

Creating sorts



- Select ‘Acending’ or ‘Descending’ for the field
- Can insert ‘Sub-Totals’ which are used when exporting the list to Excel

Creating Sorts



Whs	Item	De	Stk UM	On-hand	MO Qty	PO Qty	CO Alloc	MO Alloc	On-hand $
1	AABALLY	AA	EA = Each	3,963.000	0	0	0	0	0.00
1	ABALLY	AB	EA = Each	100.000	0	0	0	0	0.00
1	AFXMD	AF/X BODY	EA = Each	-1.000	0	0	0	0	-85.00
1	AFX01CL	'64-'72 BODY GM DISC CONV(LA)	EA = Each	1.000	0	0	0	0	166.82
1	B-AFXCL	AFX FRONT CONV	EA = Each	21.000	0	0	0	0	54.60
1	FFB6926	OM-LFT FRNT POW DISC BRAKE	EA = Each	21.000	0	0	0	0	210.00
1	FFB6929	OM-RIGHT FRONT POW DISC BR	EA = Each	21.000	0	0	0	0	420.00
1	FMC6701	OM-REAR MSTR CYL, LINE SQU	EA = Each	21.000	0	0	0	0	21.00
1	FPV6701	OM MSTR CYL TO PROP.VALVE	EA = Each	21.000	0	0	0	0	21.00
1	FPV6903	OM PROPOR.VALVE TO DIST B	EA = Each	21.000	0	0	0	0	21.00
1	MPA302	MPA302	EA = Each	9,999,999.999	0	0	0	0	0.00
1	NPY8222DKSILFUM	Yarn 8222 Dark Silver 2000/fz	LB = Pounds	10.000	0	0	9	0	0.00
1	SLX120PWC	SLX 120HP POLARIS MARINE PWC	EA = Each	40.000	0	0	0	0	0.00
1	SN1000	Serial Number Item	EA = Each	106.000	0	0	0	0	0.00
1	VS30.63AB	Vista Shag Dk Silver Action Bk	SY = Sq Yard	6,493.330	0	0	0	0	0.00
1	055553	Socle Saillie P17 IP44 16A ACH	EA = Each	-1.000	0	0	0	0	-21.00
1	1000	PC, 166 MHZ, DESKTOP	EA = Each	106.000	121	0	237	0	67,502.11
1	1000OC	BRICKS	EA = Each	10,000.000	0	0	0	0	0.00
1	1001	PC, 900 MHZ, DESKTOP	EA = Each	14,710.000	0	0	178	0	14,932,536.56
1	1002	PC, 266 MHZ, DESKTOP	EA = Each	10,000.000	0	0	30	0	13,555,682.50
1	1003	PC, 300 MHZ, DESKTOP	EA = Each	10,009.000	0	0	0	0	14,103,679.40
1	1006	PC ASSY	EA = Each	20,000.000	0	0	0	0	0.00
1	1100	Processor, 166 Mhz	EA = Each	9,990.000	0	0	4	0	3,327,703.96
1	1100OC	Stepping Stones	EA = Each	1,000,000.000	0	0	0	0	0.00
1	1101	PROCESSOR, 200	EA = Each	772.000	0	0	14	0	347,850.46
1	1102	PROCESSOR, 200	EA = Each	913.000	0	0	4	0	647,064.56
1	1103	PROCESSOR, 3XC	EA = Each	813.000	0	0	0	0	619,713.31
1	1104	SPEAKERS	EA = Each	16,225.000	0	900	516	0	1,025,582.25
1	1105	MOUSE	EA = Each	7,670.000	0	0	135	0	91,963.30
1	1106	KEYBOARD	EA = Each	9,983.000	0	0	32	0	313,965.35
1	1107	KEYBOARD ERGO	EA = Each	14,885.000	0	0	702	0	530,650.25
1	1108	MOUSE ERGO	EA = Each	81.000	0	0	11	0	1,057.05
1	1109	MOUSE PAD	EA = Each	49,980.000	0	0	0	0	49,980.00

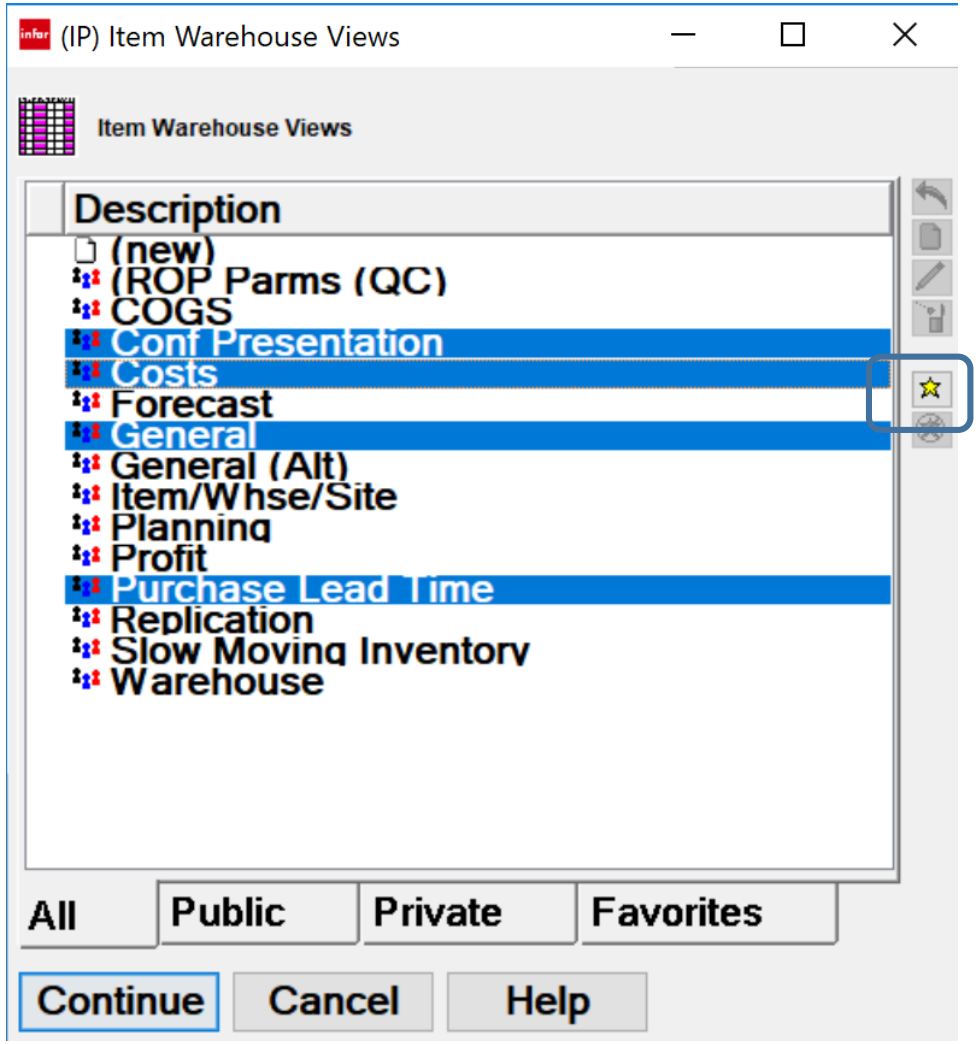
If you hover the mouse over the ‘Locate’ button the sort fields will be displayed

Favorites

Favorites

- This option is, in my opinion, the most underused and biggest contributor to efficiency in PowerLink
- Setting favorites in views & subsets will limit the options shown when using the pull down window to select the view/subset to apply
- All views/subsets can still be accessed to use one that is not flagged as a favorite

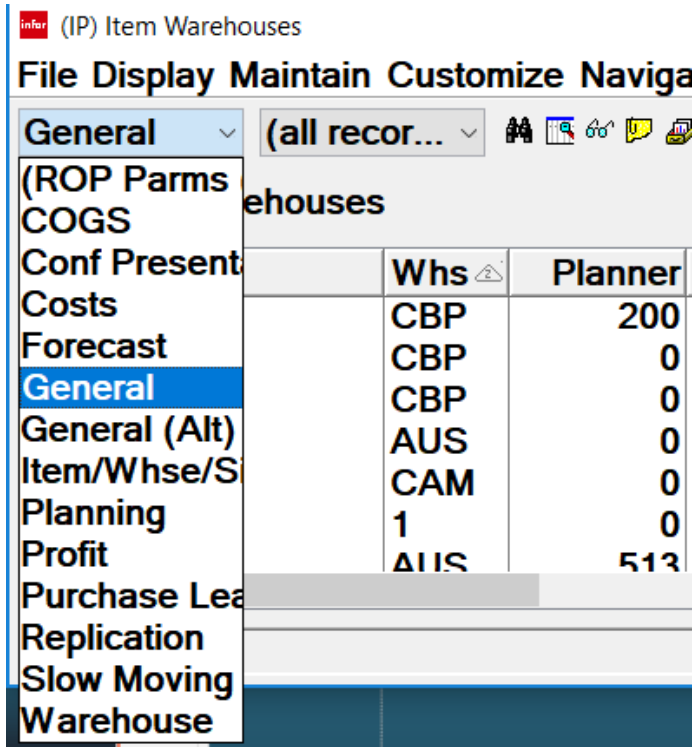
Favorites



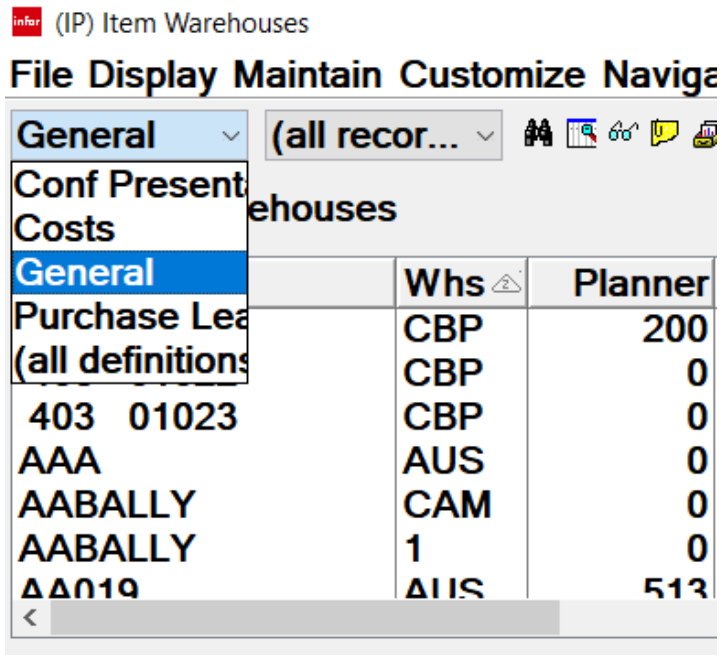
- Select the views/subsets that you want to flag as a favorite by holding down the 'Ctrl' key and clicking on the options
- Click on the 'Favorite' button
- The gold star will appear to the left of the options selected as favorites
- To remove an option as a favorite, click on the 'Remove Favorite' button

Favorites

- Before



- After



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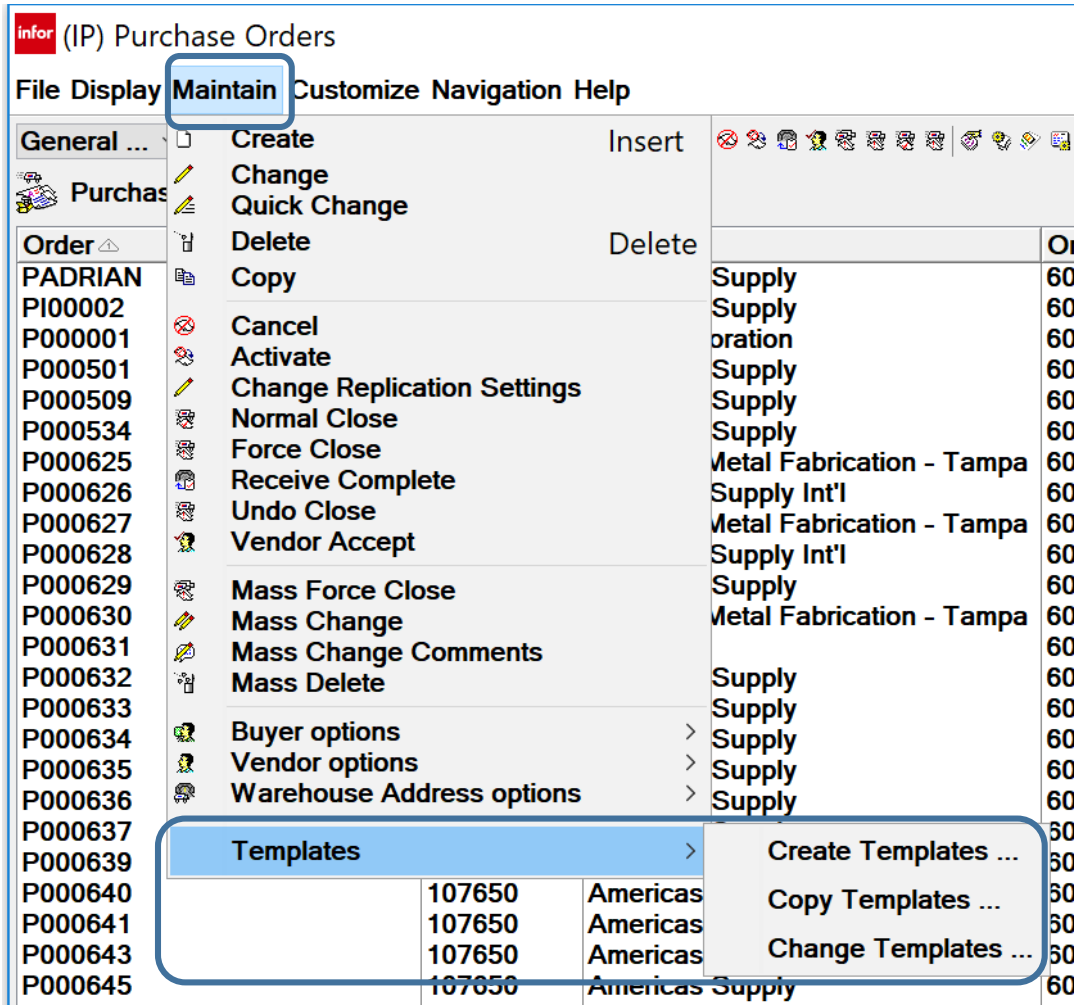
THE INFOR XA EXPERTS

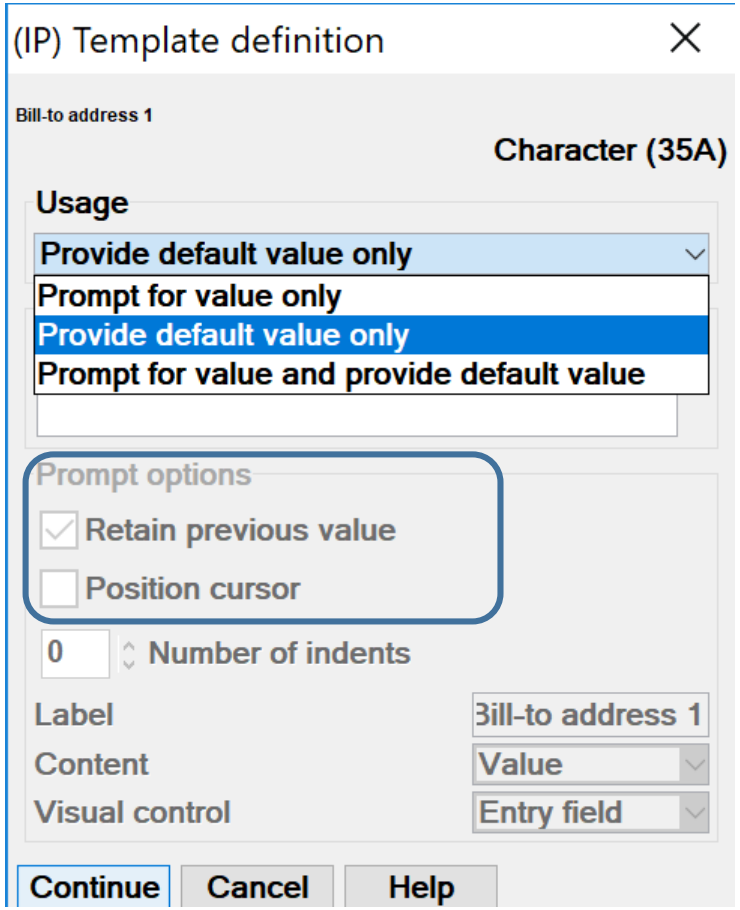
Templates

Templates



- Templates are used when you create, change or copy information
- Use of templates will reduce keystrokes and help insure data accuracy
- Used for MO's, PO's & CO's in addition to items, item warehouses, etc.

Templates



- 3 'Usage' options when creating a template:
  - ***Prompt for value only***
    - Adds the field to the card with no default value
  - ***Prompt for value and provide default value***
    - Add the field to the card
    - Shows the default value which can be changed
  - ***Provide default value only***
    - Will add the default value to the field without displaying the field on the card
- Options
  - Retain previous value
    - Leaves the information from the last added order or record in the field
  - Position cursor
    - Designates the active field when adding a record

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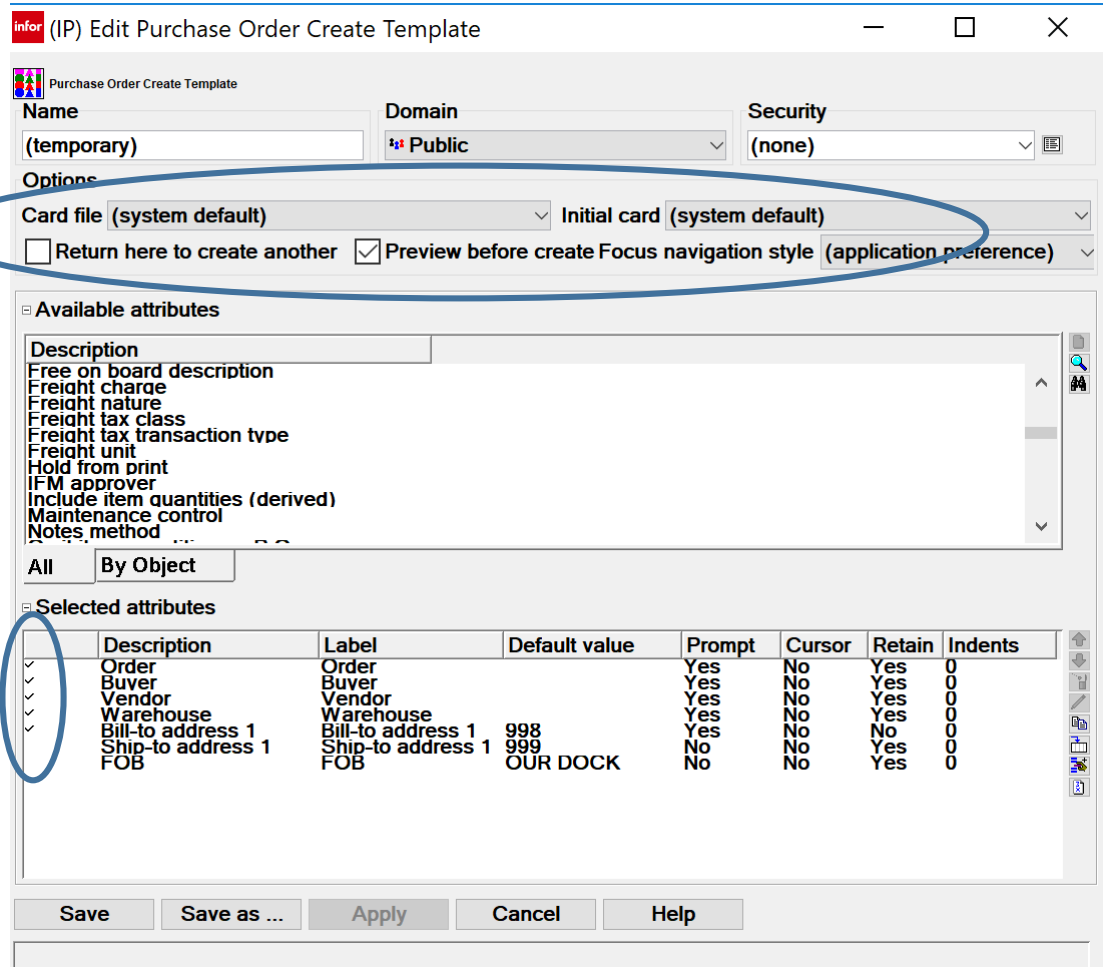
THE INFOR XA EXPERTS

Templates

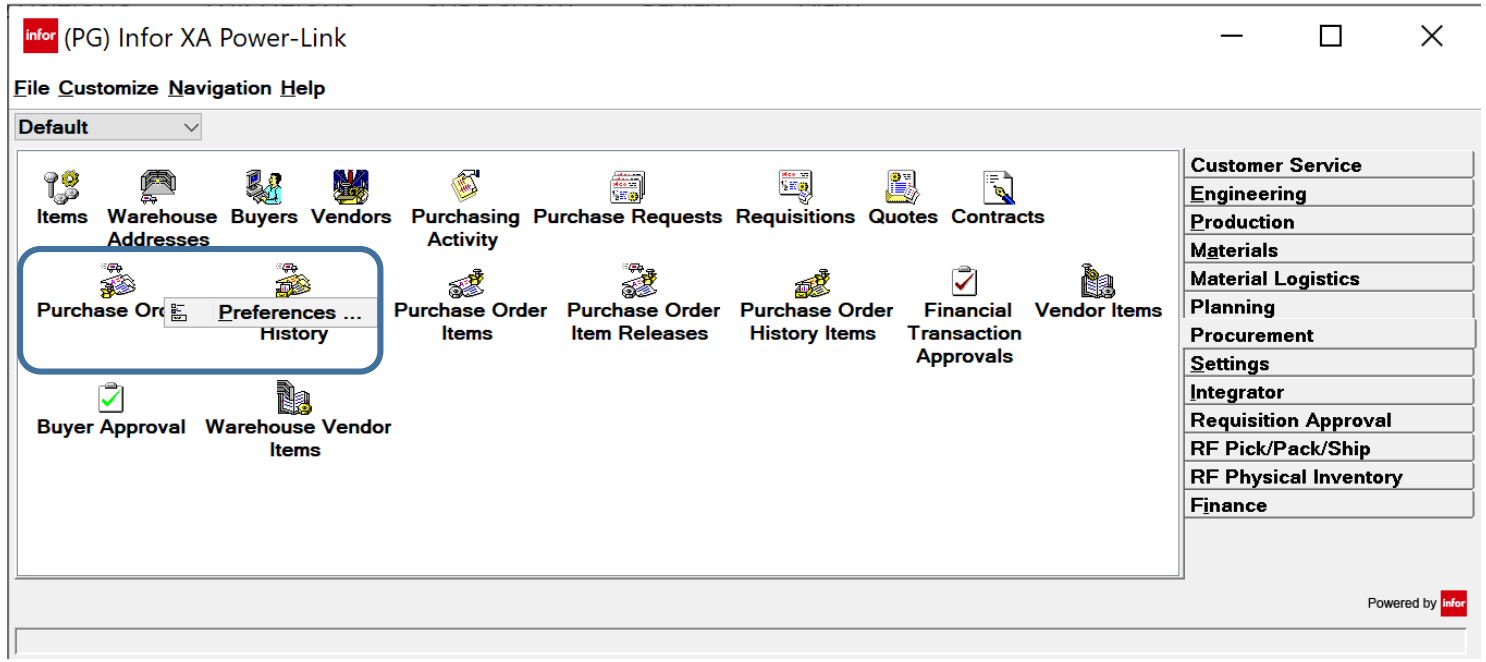


- Can define the card file and initial card to be displayed when using the template
- Can check/un-check ‘Return here to create another’ and ‘Preview before create’
- In the ‘Selected Attributes’ section, fields with a check to the left are the fields that will be shown on the create window

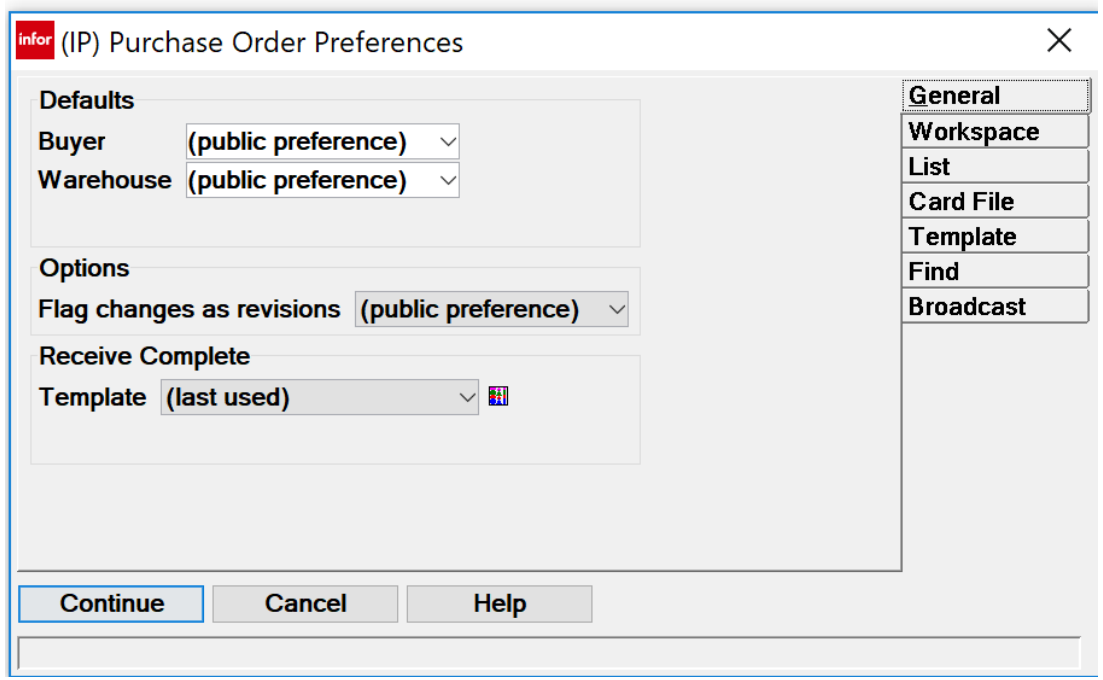
Object Preferences

Setting Object preferences

- Can right click on any object the main card file to set personal preferences
- Can also use (from the menu bar) ‘Customize’ then select ‘Preferences’
- Preferences are designed to make you more efficient when working in PowerLink/XA and are the most underused options in PowerLink/XA

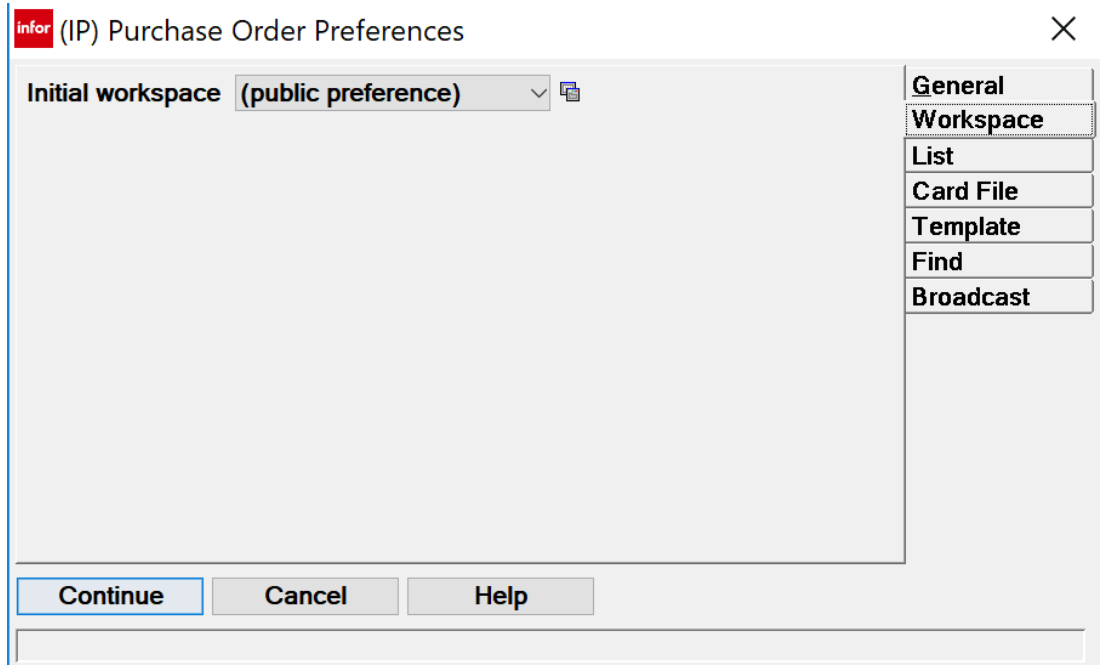


Object Preferences - General



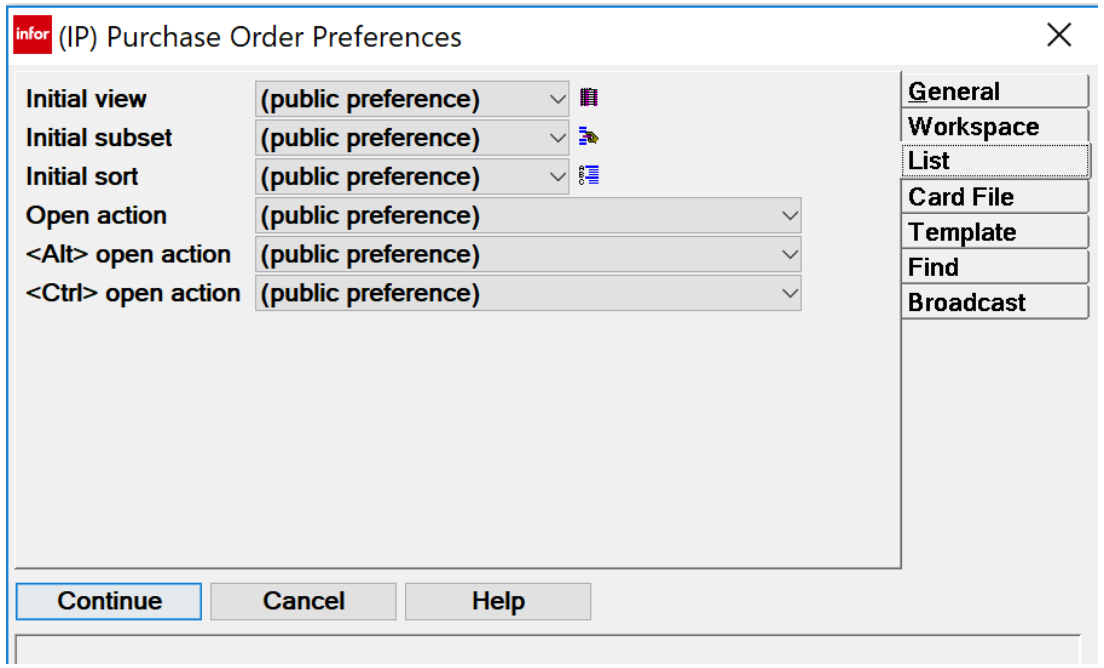
- Sets default values for specific fields
- Options will change depending on the file

Object Preferences - Workspace



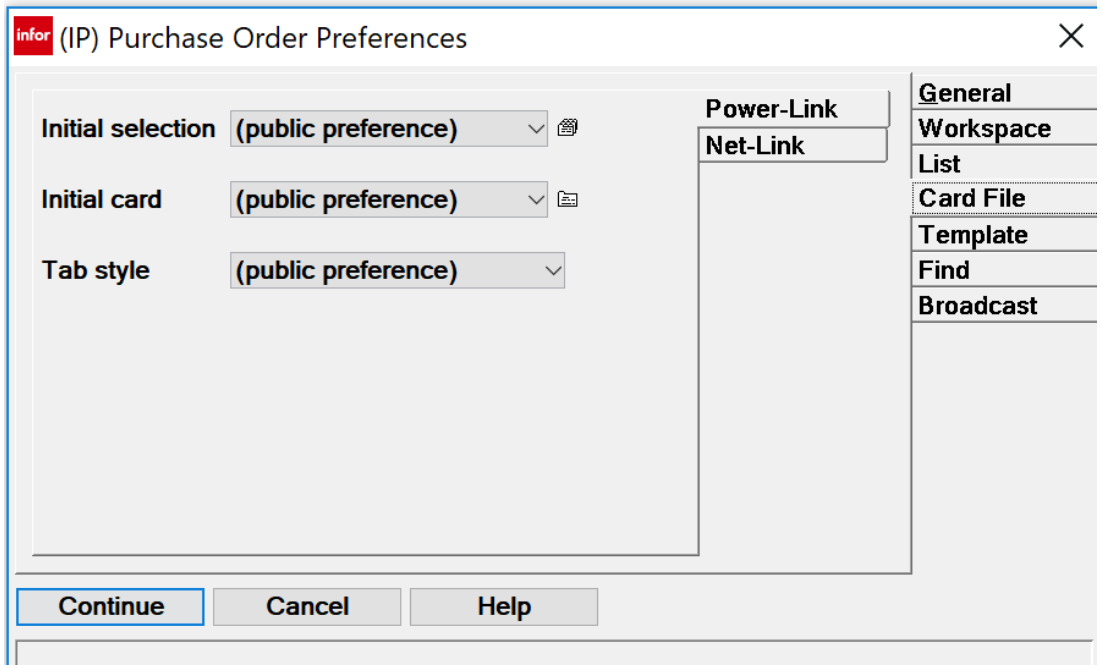
- Workspaces define multiple values for a file:
  - View
  - Subset
  - Sort
  - Toolbar
- Useful to prevent having to select each individually

Object Preferences - List



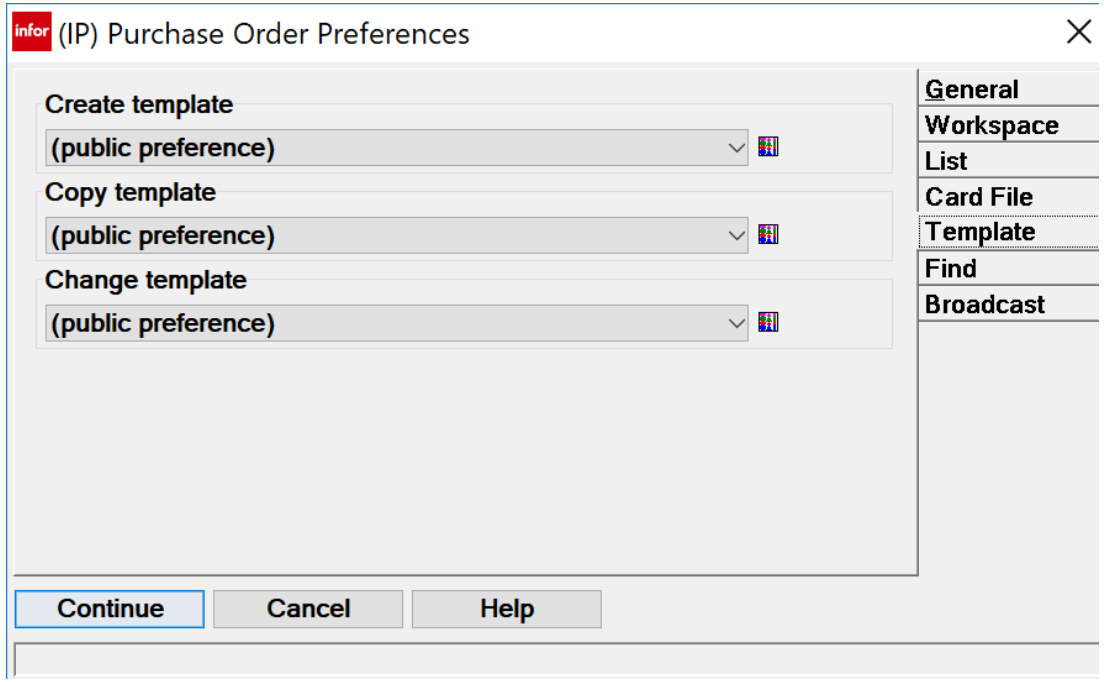
- List options determine the view, subset and sort to use when you open the object
- Open Actions are used when you double click on a record in the list
  - 3 options for open
    - Double click only
    - Hold the ‘Alt’ key while double clicking on the record
    - Hold the ‘Ctrl’ key while double clicking

Object Preferences – Card File



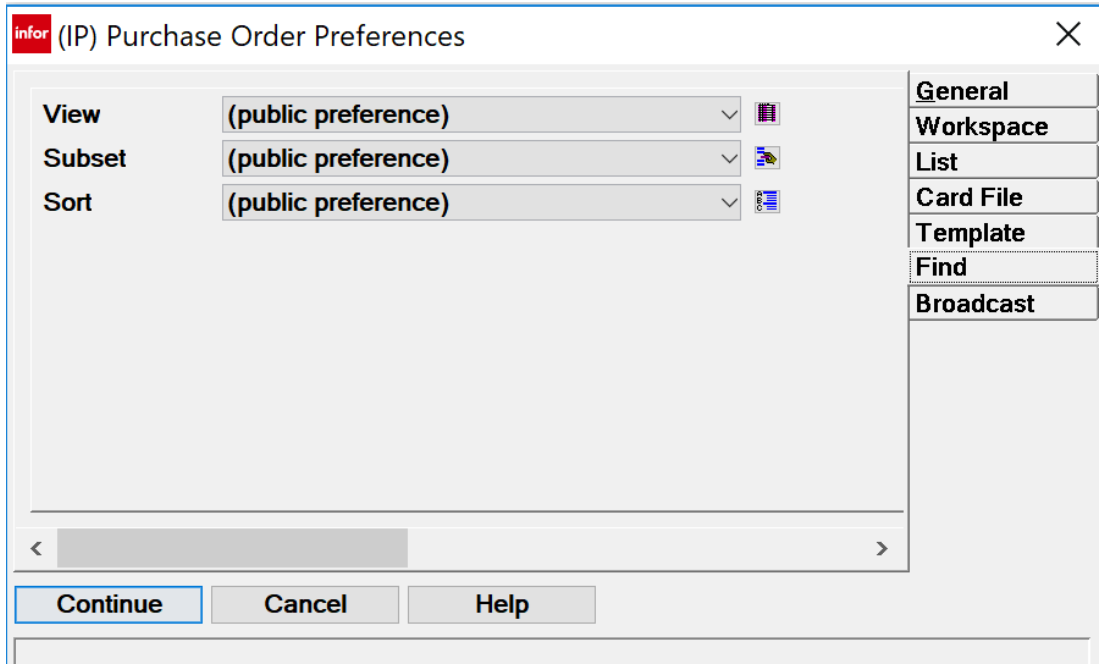
- Initial Selection
  - Sets the default card file to be used when opening/double clicking on a record in the list
- Initial Card
  - Determines which card should be the active card when the card file opens
- Tab Style
  - Sets the position of the tabs in the card file

Object Preferences - Template



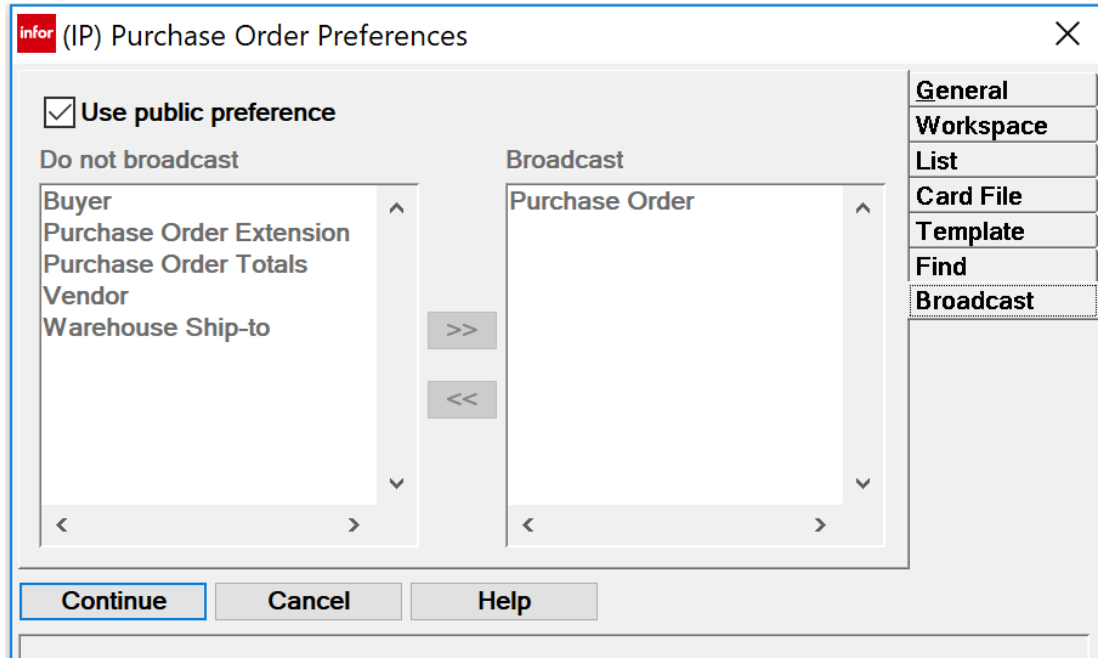
- Sets the default template for each action:
  - Create
  - Copy
  - Change

Object Preferences – Searc Find



- When using the 'Search' button
  - Sets the View, Subset and Sort for the records that are displayed

Object Preferences - Broadcast



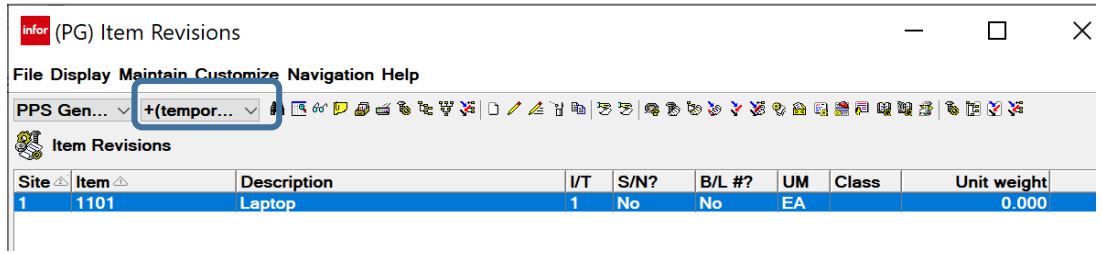
- Broadcast/receive is used when defining a 'Work Bench'
- Preference setting defines the files that will be used to broadcast
- NOTE: if you set up a broadcast/receive option between 2 lists and, when clicking on a second record, the 'Receive' display isn't updating, check your preferences
  - Uncheck the 'Use Public Preference' option
  - Select all the files in the 'Do Not Broadcast' box
  - Add them to the 'Broadcast' list

Shortcut Keys

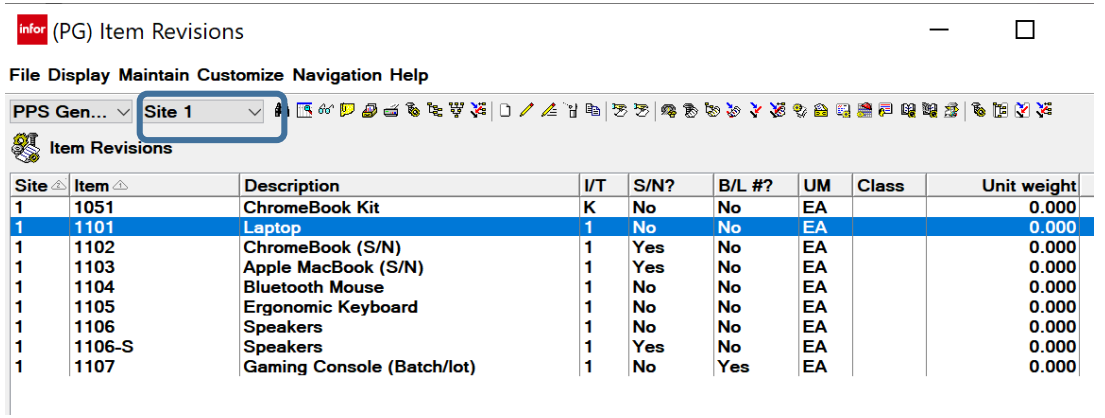
Shortcut keys

- Control (CTRL) + Z: *Undo*
  - Useful when using prompted or temporary subsets; goes back to the previous subset
- Control + C: *Copy*
  - Copies a value to a field even if it's copied from another file (i.e. Excel) or a field on an attribute card
- Control + V: *Paste*
  - Inserts the copied value into a field
- Control + Y: *Re-display prompt*
  - If using a subset (either temporary or saved) with a 'Prompt' field, will re-display the pop-up to allow for a different value
- Control + L or Control + F: *Locate/Find*
  - Jump to a value in a list
  - Only the fields that are used in the Sort will be displayed when using the Locate/Find shortcut

Control (CTRL) + Z: *Undo*



Site	Item	Description	I/T	S/N?	B/L #?	UM	Class	Unit weight
1	1101	Laptop	1	No	No	EA		0.000

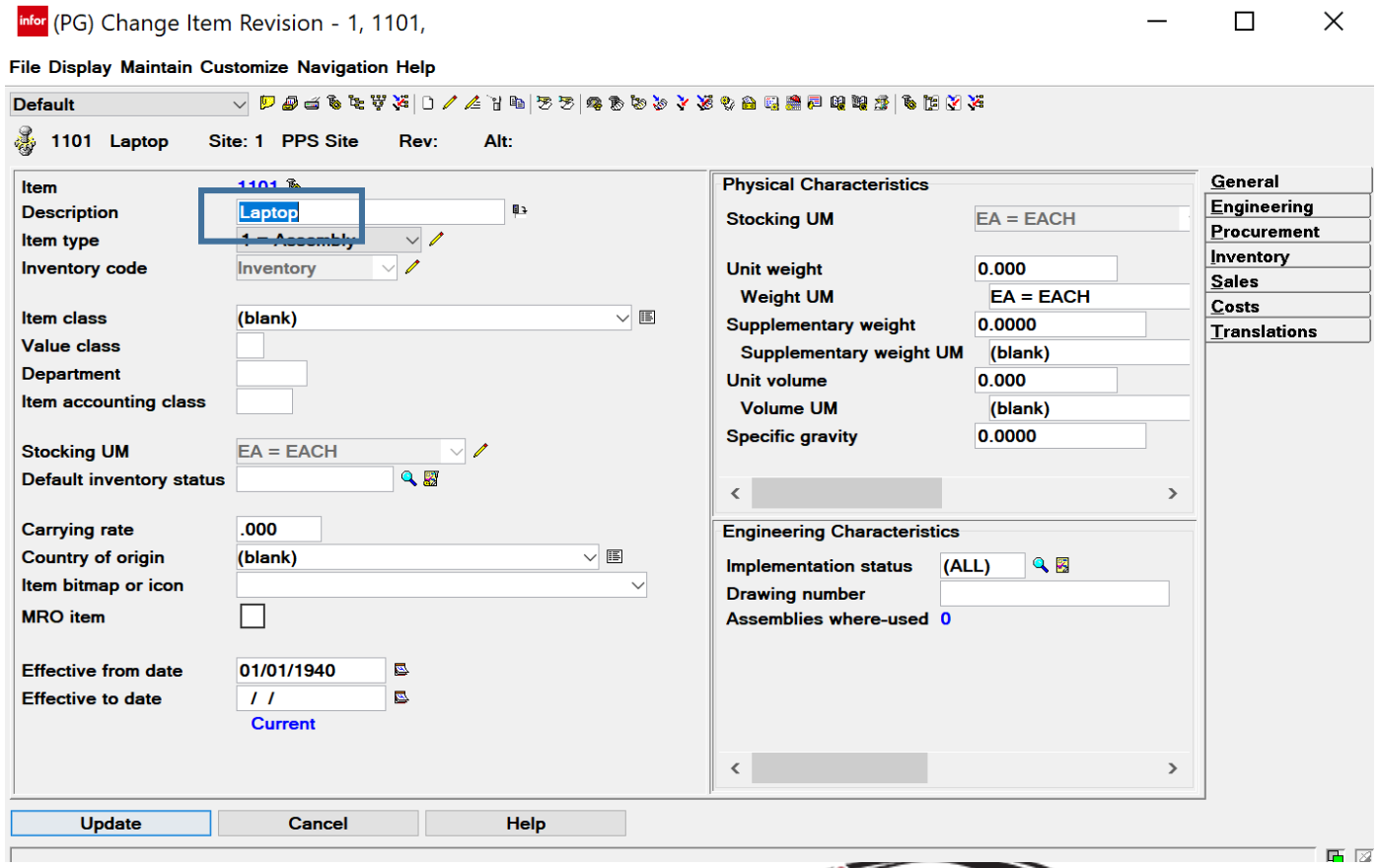


Site	Item	Description	I/T	S/N?	B/L #?	UM	Class	Unit weight
1	1051	ChromeBook Kit	K	No	No	EA		0.000
1	1101	Laptop	1	No	No	EA		0.000
1	1102	ChromeBook (S/N)	1	Yes	No	EA		0.000
1	1103	Apple MacBook (S/N)	1	Yes	No	EA		0.000
1	1104	Bluetooth Mouse	1	No	No	EA		0.000
1	1105	Ergonomic Keyboard	1	No	No	EA		0.000
1	1106	Speakers	1	No	No	EA		0.000
1	1106-S	Speakers	1	Yes	No	EA		0.000
1	1107	Gaming Console (Batch/lot)	1	No	Yes	EA		0.000

- Right Click on ‘Item’ then ‘Customize’ and ‘Subset Criteria’ creates a ‘Temporary Subset’
- Control + Z will take you back to the previous subset that was being used

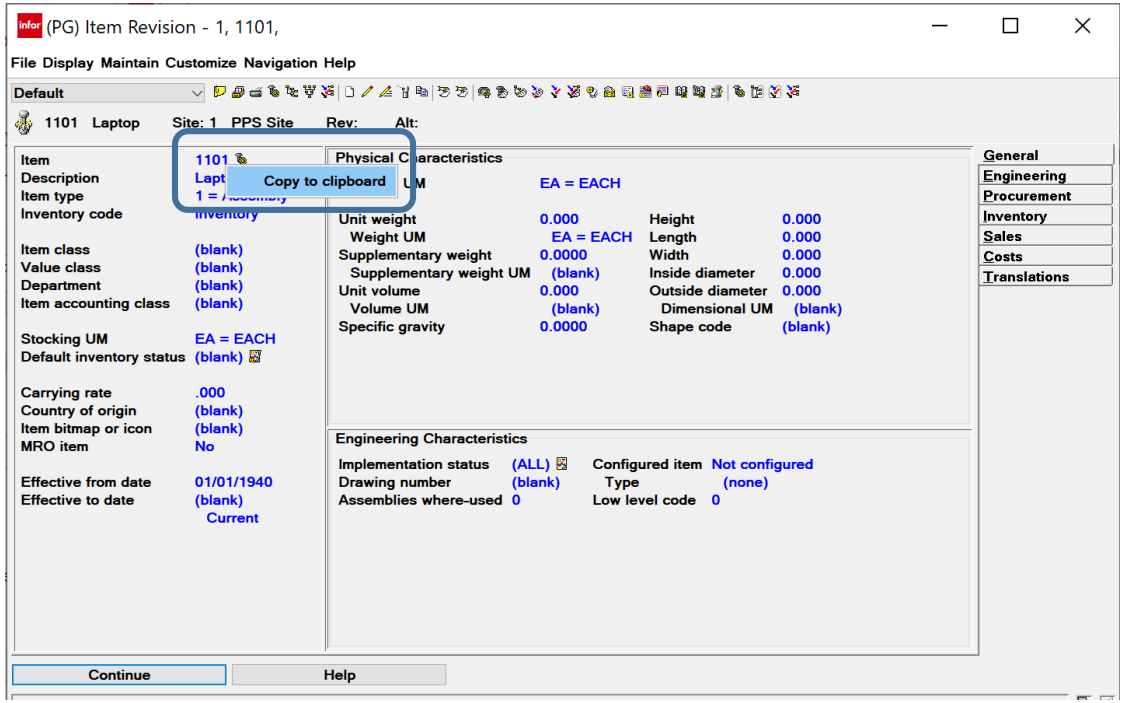
Control + C: *Copy*

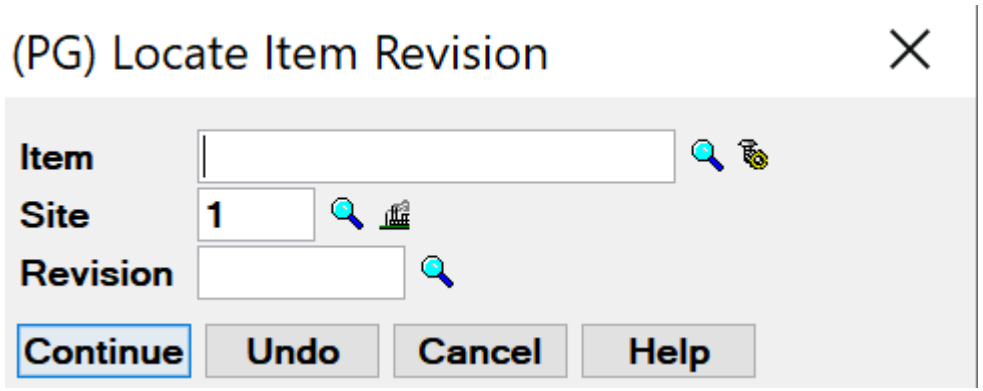
- Highlight a value in a field then press Control + C to copy that value
- In the example below, the description of the item is being copied



Control + V: *Paste*

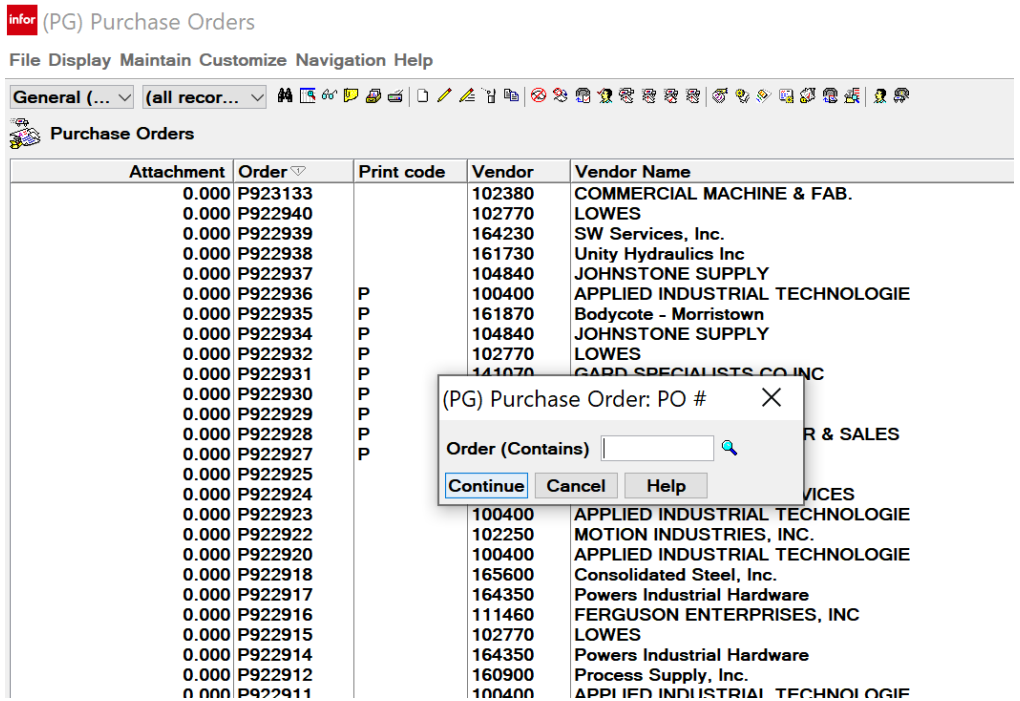
- When using Attribute Cards, right clicking on a value (Item Number in the print screen below) will display an option to copy to clipboard
- Then, using the Locate button , use Control + V to paste in the number

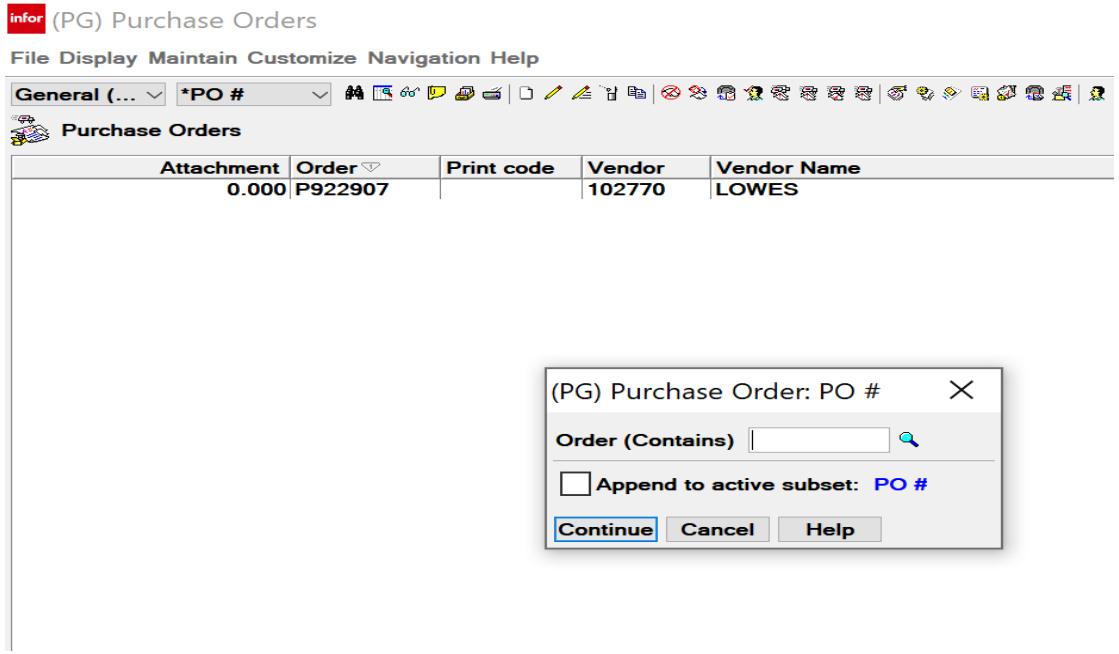




Control + Y: *Re-display prompt*

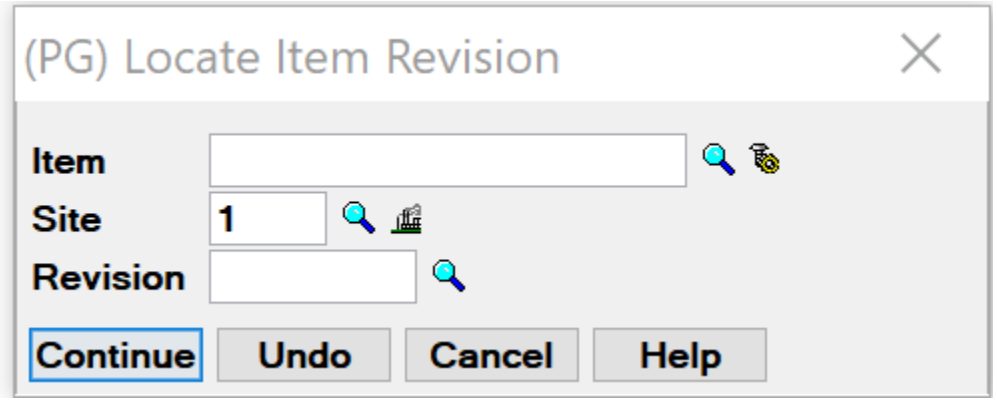
- If you're using a Subset that has a 'Prompt for Value' field in it, Control + Y will re-display the Prompt window without having to re-select the subset





Control + L or Control + F: *Locate/Find*

- Clicking on the ‘Locate’ button
- OR using Control + L (Locate)
- OR using Control + F (Find) will bring up a window asking for criteria to locate/find the record
- NOTE: The sort being used on the list determines the fields displayed in the locate/find prompt



Conclusion

- PowerLink gets it's name from the 'Power' options available throughout the application
- Topics for the next presentation 'The Power of PowerLink Part 2'
  - Cards
  - Card Files
  - Workbenches
  - Workspaces
  - Presentation Schemes
  - Quick change